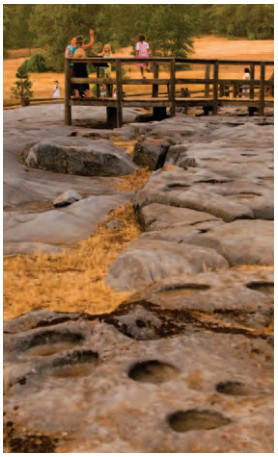
CALIFORNIA STATE PARKS · 2013

Interpretation Planning Workbook



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Interpretation Planning Workbook

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* Classifications and divisions reflect the positions held by these individuals at the time of publication.

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THE ROLE OF PLANNING IN INTERPRETATION: THE BIG PICTURE

Introduction

Good interpretive planning determines the most effective way to communicate messages

Interpretation is the fundamental communication tool that gives voice to the rich and vast cultural and natural resources in California's state parks. Effective interpretation relates the significance of these resources, and enables visitors to better understand their environment and to build connections. It also can guide appropriate visitor access and resource usage within parks. Interpretive planning sets the foundation for effective interpretation by establishing the communication process through which the meanings and relationships with the cultural and natural resources are revealed to a visitor through experiences with objects, artifacts, exhibits, sites, landscapes and people.

As defined by the National Association for Interpretation, "Interpretive planning is the decision-making process that blends management needs and resource considerations with visitor desire and ability to pay to determine the most effective way to communicate the message to targeted markets." Interpretive planning gives focus and direction to the development of park unit facilities and activities.

Who does interpretive planning?

According to California State Parks' *Department Operations Manual* (DOM) section 0902.1, "Interpretive planning can occur at many levels; it may be facilitated by headquarters, the Service Centers, a district, park unit, support organizations or by contract." Interpretive planning is a team effort that should involve park and district staff, local community and any other interested constituencies.

The Benefits of Interpretive Planning

Interpretive planning establishes unifying goals, objectives and messages for the park unit and/or interpretive project(s). This facilitates cohesiveness of interpretive services within a park unit so visitors leave the park with clear messages that reinforce each other, rather than a jumble of unrelated facts and themes. Through interpretive planning you will also gain a better understanding of park resources, your audience (who is or is not coming) and their needs.

Good interpretive planning saves money by:

- Reducing false starts and unnecessary project work;
- Organizing program management;
- Prioritizing interpretive services in order of need; and
- Eliminating ineffective projects and programs.

Good interpretive planning brings in money by:

- Producing an attractive, well-researched and well-written document that can be used to generate support for park interpretation improvement.
- Demonstrating project or program development readiness, important for obtaining funding.
- Including planning to generate revenue via value-added interpretation and additional uses of interpretive venues.

A well-thought out interpretive plan is an effectual tool in the seemingly never-ending pursuit of funding. An interpretive plan answers key questions such as “what are the project/program goals and objectives?” “Whom will it serve?” “How will the project reach the targeted audience?” and “How will the project be evaluated?” These answers can show a potential funder that the project or program is well-developed and organized. Also, much of the information requested on grant applications can be found within an interpretive plan.

The process of interpretive planning challenges us to learn from past mistakes, to understand our audience, the resources at hand and the ideas that we would like to communicate. It can be like walking a tight rope, balancing public use and access with resources protection, weighing design concepts against project funding, or steadying labor-intensive historical accuracy with available maintenance resources. Properly analyzing your situation, setting goals and objectives, establishing themes, researching content, creating workable design concepts, precisely budgeting the project and evaluating its strengths and weaknesses, both before and after implementation, are key to the success of a project. A well-planned interpretive service or project will not only

be favorably received by park staff and the public alike, it will also demonstrate money wisely spent as the Department endeavors to fulfill its mission.

Planning Policy

As stated in DOM, "interpretive planning documents are used to guide long and short-term projects to help realize the park unit's critical goals and objectives" (DOM, 902.1). This policy states that "the District Superintendent shall be responsible for developing a systematic process for interpretive planning and for review and approval of interpretive planning documents within his/her district." Furthermore, this policy states that all interpretive planning shall (DOM, 902.1.1):

- Identify and describe cultural, natural and/or recreational resources of significance;
- Involve interested constituencies;
- Gather, organize and analyze documents, data and references;
- Articulate interpretive themes that appropriately represent park resources;
- Establish interpretive period(s) for cultural resources;
- Identify educational content standards and learning objectives;
- Designate suitable locations (e.g., outdoor settings, facilities) for accessible interpretive activities;
- Select methods and media for conveying the interpretation;
- Develop content—the background information for storylines to be highlighted through interpretation;
- Create a process for evaluating completed interpretive facilities and programs.

Keep in mind that these policy points are the basic elements of interpretive planning.

Defining Interpretive Plans

Interpretive planning is a process with each new interpretive plan building on the goals, objectives, strategies and research of previous plans. Each planning document has a specific intent and purpose. The types of interpretive plans and associated policies are stated in DOM section 0902.6.

The **General Plan** is the primary management document for each unit of the California State Park System, defining a park's primary purpose and establishing a management direction for its future development and operation. By providing a clear purpose and vision, guidance on long and short-term goals, and guidelines, the General Plan defines the broadest management framework possible for a unit's development, ongoing

management, interpretive programming and public use. An approved General Plan must be in place for facility development.

By law the State Park and Recreation Commission has the authority to review and approve General Plans of the State Park System. As land-planning documents, they are subject to review under the California Environmental Quality Act (CEQA).

Not all park units have a General Plan to guide planning efforts. If a unit lacks an approved General Plan, park managers may choose to develop either an Interpretive Prospectus or an Interpretation Master Plan (IMP) to facilitate long-range interpretive planning and programming.

The **Interpretive Prospectus** is a provisional document developed to guide park interpretation in lieu of an approved General Plan. An Interpretive Prospectus may be developed when there is no approved General Plan for a park unit or the approved General Plan does not contain sufficient detail to adequately guide the development of interpretive services for a unit. The Interpretive Prospectus contains the same information as an Interpretation Master Plan up through the sections which lay out goals and objectives for park interpretation

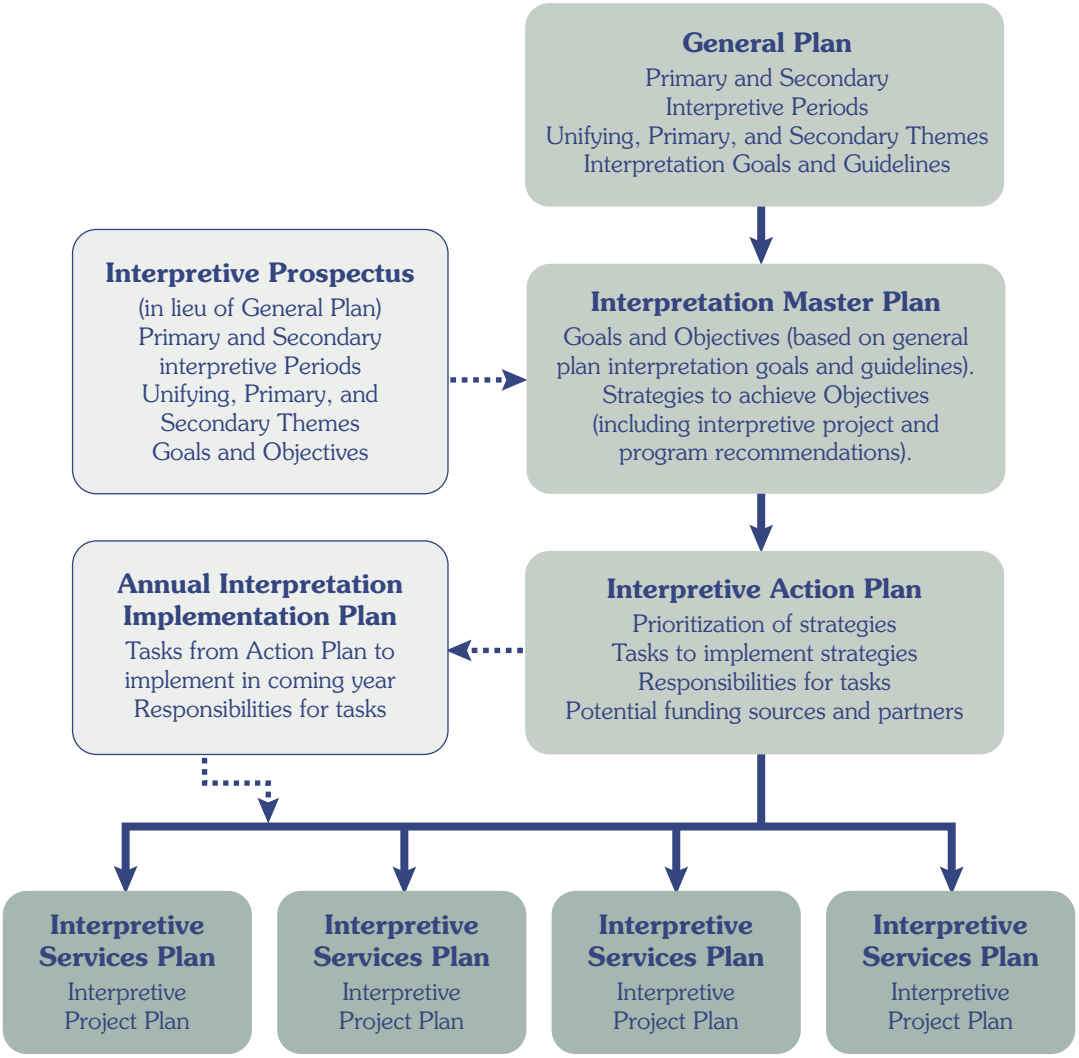
Interpretation Master Plans and **Interpretation Action Plans** are Interpretation Management Plans. Management Plans, defined in the California State Parks *Planning Handbook,* more specifically define the objectives, methodologies and concepts for how goals and guidelines identified in the General Plan will be achieved. An **Interpretation Master Plan** takes a long-range approach to interpretation planning and may be developed for a unit, sector or geographical region, or may be used for particular resources found throughout the state. It updates and expands upon the General Plan. The Master Plan provides greater background and context, while analyzing existing conditions and looking at opportunities and constraints for expanding interpretation and meeting visitor needs. The Master Plan can be a stand-alone document or combined with an Action Plan. An **Interpretation Action Plan** is a "roadmap," offering a realistic and flexible mechanism for achieving the goals, objectives and strategies developed in the park unit's Interpretation Master Plan. An Action Plan should follow the development of a Master Plan.

Interpretive Services Plans make detailed recommendations for producing formal exhibits, furnishing historic settings, creating audiovisual media, developing trails and wayside exhibits, or producing such interpretive programs as living history or environmental living activities. Interpretive Services Plans take their direction from the park unit's General Plan and Interpretation Management Plans. Interpretive Services Plans fall into two categories: Interpretive Project Plan and Interpretive Program Plan.

> *Interpretive Project Plans* include, but are not limited to Exhibit plans, Furnishing plans, Audiovisual plans and Interpretive Trail plans.

Interpretive Program Plans include Living History plans, Environmental Studies plans and Environmental Living plans.

The **Annual Interpretation Implementation Plan** is a versatile planning tool for Districts to help give structure and direction to their overall interpretation program. This planning document is prepared each year by District and park staff to identify objectives of the interpretive program for the District and to set priorities for the coming year. The plan is reviewed throughout the year to ensure objectives are met.



HOW TO USE THIS WORKBOOK

The Interpretation and Education Division, the Service Centers, and a variety of District Interpretive Coordinators and resources specialists have created this workbook to help you develop practical plans for interpretive projects within California State Parks. Whether you are working on a visitor center, audiovisual program, historic setting exhibit, demonstration area, traveling exhibit, hands-on/discovery area or other projects, this manual explains key planning concepts and outlines procedures for developing, producing and evaluating them.

The easy-to-use format is set-up to provoke critical thinking about interpretive plans and to ensure that all aspects have been carefully considered about any given project. Checklists in Appendix E will provide you with ideas and options to take into account in your planning process. At appropriate points, the main workbook text will give a page number and an electronic link to the relevant checklist. Use the checklists for ideas of what to consider for specific planning elements, but don't limit yourself to what is on the lists.

The workbook is organized into five main chapters. The **Success Starts Here** chapter provides you with the foundational material you and your team must consider before you begin the interpretive planning process, such as why do interpretive planning, what to expect and who should be on your team. This in-depth chapter walks you through the major components and stages of the various types of interpretive plans. If you have never done interpretive planning before, read this chapter first.

Chapters Two through Five each focus on a different type of interpretive plan. Chapter Two addresses the Interpretation Master Plan, Action Plan and Interpretive Prospectus. Interpretive Project Plans and Interpretive Program Plans are found respectively in Chapters Three and Four. Chapter 5 focuses on the Annual Interpretation Implementation Plan. Within each chapter use the template to organize the essential elements that will comprise your plan. Prompts will guide you through the process of researching for and writing the plan. A written plan is essential not only for directing the course of a project, but also for justifying its direction.

Terms often used in the interpretive planning process have been included in a Glossary in Appendix A. Definitions are provided to aid communication among interpretive planners and contractors. Also in the Appendices are planning checklists, a list of Selected Research Institutions in California, a Bibliography for Interpretive Planning, a list of other resources for interpretation planning, and a table of estimates of planning and project costs and time.

Adapt this workbook to meet your own particular interpretive planning requirements. Although every plan will be unique, there should be sufficient flexibility in the workbook to accommodate nearly every interpretive plan. This is a "living" document. Any suggestions you may have for improving the Workbook should be addressed to the Interpretation and Education Division, whose staff will produce new editions as needed.

Chapter One

SUCCESS STARTS HERE

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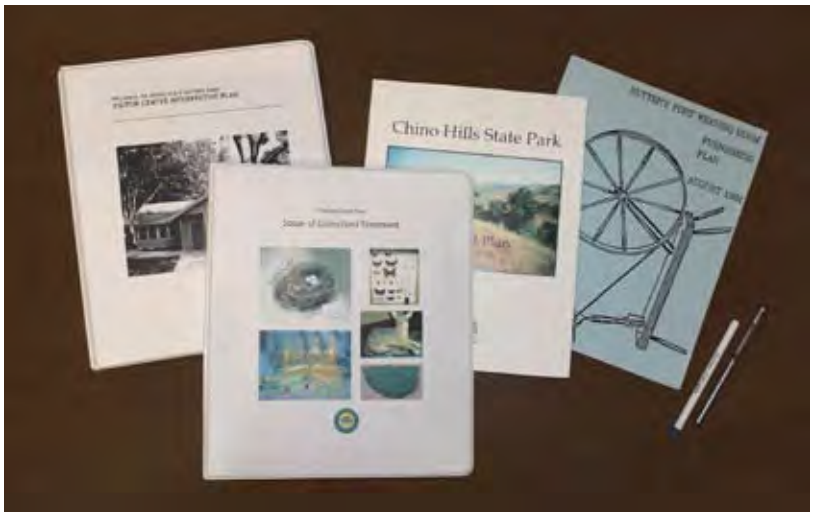
1.1 WHAT ARE YOUR INTERPRETATION PLANNING NEEDS?

Locating existing planning documents

Before beginning any planning you need to know what prior planning has occurred. Pull together existing planning documents for the park unit, sector and/or district. These documents can be found on the Unit Data File (UDF), park or district libraries, Department Archives, or the libraries of the Service Centers or Interpretation and Education Division.



Look for existing planning documents, such as general plans, interpretive prospectuses, and interpretation master plans

Types of plans to review:

- General plans and amendments
- Interpretive prospectus
- Previous interpretive plans
- Management goals and practices
- Scope of collections statement
- Concession plans
- Old furnishing plans
- Exhibit plans
- Feasibility studies
- Historic structures reports
- Resource inventories
- Unit files, unit histories
- Cooperating association plans
- Operation plans

Existing planning documents are useful in identifying the level of planning that has occurred, and understanding the interpretive direction laid out, if any, for the park unit, sector or district. From these plans you can garner information, including goals and objectives, significant resources, identified concerns or needs; or project and program ideas to be used, updated or revised during the current planning process.

Determining if a plan is necessary

Before proceeding with any in-depth analysis or planning, consider the impetus for the plan. What is its justification? Determine the present level of interpretation. What works? Where is it lacking? Is there a problem that needs to be addressed (e.g. worn-out

facilities, out-of-date interpretation, changes in audience demographics)? See the "Why is this Plan Needed?" checklist on page 211 for more potential reasons to consider.

Questions should also be asked about the plan's feasibility:

- Are sufficient resources available? (e.g. funding, staff, existing collections)
- Does the interpretive significance to the park warrant the anticipated expenditure of money and resources?
- Is staff available to work on the planning team?
- Is this the right time to begin the plan or project?
- Will the plan or proposed project/program unnecessarily duplicate existing interpretation elsewhere in California State Parks, or in other nearby interpretive facilities?

Evaluating a plan's feasibility is important. If park staff or funding/support will not be available in the foreseeable future, consider postponing the plan for a time. However, in some instances, a well-thought-out interpretive plan with clearly outlined goals and objectives can be an effective tool in securing funding or support for a project or program.

Factors to Consider When Prioritizing Planning Needs

Interpretive planning documents vary according to their purpose and the details required to support the level of interpretive development. Knowledge of previous planning efforts will aid in determining the type of interpretive plan.

Why an Interpretation Master Plan if a General Plan already exists?

Interpretation Master Plans contain many of the same planning elements used in developing the interpretation sections for General Plans completed after 2010. Older General Plans may not contain adequate or up-to-date interpretation direction. The California State Parks *Planning Handbook* (April 2010) provides directions for documenting existing interpretation as part of the General Plan process. Although this data is compiled in an Interpretation and Education Resource Inventory, the final General Plan contains only a brief summary of these planning elements. An Interpretation Master Plan, on the other hand, can contain much more detailed information.

The General Plan process also includes the development of interpretive goals and guidelines. This is where the General Plan ends and the Interpretation Master Plan continues. As planners develop measurable objectives and identify key strategies during the Interpretation Master Plan process, the park's interpretation vision begins to take shape. Development of the Interpretation Action Plan completes the planning process by

creating the road map for implementing the Interpretation Master Plan.

An Interpretation Master Plan provides greater background and context than a General Plan. It analyzes existing conditions and looks at opportunities and constraints for expanding interpretation and meeting visitor needs. Factors to consider in determining whether to develop an Interpretation Master Plan include the size and scale of the interpretive facility (both in physical size and in budget) or program in relation to the size of the park unit. Master Plans may be used to request and attract funding for project-specific development.

Why develop an Interpretive Prospectus instead of a complete Interpretation Master Plan?

Completing an Interpretive Prospectus will be a shorter and easier planning effort than that needed for a full IMP. It may be desirable to develop a plan quickly in order to use it to attract funding, for example as part of a grant application package. An Interpretive Prospectus can also be used as the basis for temporary exhibits and personal interpretation when funding and/or time do not yet allow for the development of the full IMP. Since the Prospectus contains much of the content of an IMP, it can be expanded into a full IMP at a later date.

Why an Interpretive Services Plan if an Interpretation Master Plan does not exist?

As discussed above, an Interpretation Master Plan precedes development of Interpretive Services plans. However, occasionally there may be times when an Interpretive Services Plan is immediately required. For example, funds may be available for a specific interpretive project or program. When this is the case, it is still prudent to develop an Interpretation Master Plan first if there is a possibility that additional funds and/or staff time may be available.

If funds or staff time are limited and a project or program has received financial support, the team must complete an Interpretive Services Plan. See the definitions on pages iv-v to determine if an Interpretive Project Plan or an Interpretive Program Plan is to be developed.

Interpretive projects and programs that require funding must be entered in the Park Infrastructure Database (PID). If the park does not yet have an Interpretation Master Plan, be sure to also enter this in PID.

1.2 WHAT TO EXPECT

Budgeting

Interpretive plans require extensive staff time and funding to complete. Based on estimates from previous planning, you will need to budget for salary and benefits, public and stakeholder outreach, visitor studies, contracts, purchases, travel and per diem. See Planning Budget checklist on page 212 in Appendix E, and Appendix F—Interpretive Projects Costs and Time—for more ideas of what may need to be budgeted, and how much budget items may cost.

When working to complete a budget for your plan, consider the following:

- Is this plan currently identified as a priority for your district in the Park Infrastructure Database (PID), cooperating association strategic plans and annual plans for interpretation?
- How can this plan be phased if you only have limited funds or staff time?
- Can any of the background research be completed by volunteers or subject experts available within our department?
- How much staff time can be committed to project management and completing this plan?
- What funding sources are available both internally (within California State Parks) and externally to complete this plan?
- What are the deadlines for encumbering awarded funds?

Also, you will find that planning is worth the investment as your completed plan will help you communicate and prioritize your interpretive needs for potential funders of new projects.

ACKNOWLEDGING SPONSORS AND DONORS

Are you planning a project or program that will be paid for at least partially by donors or sponsors? Are you including strategies for attracting donors and sponsors in an Interpretation Master Plan? Ensure that any donor or sponsor recognition is in line with Department Notice 2006-04, and the *California State Parks Donor & Sponsorship Recognition Guidelines.* You can download the guidelines from the Document Library page on the Department's Intranet site.

Planning for donor and sponsor recognition needs to begin early in the process of developing a project or program plan. You may even decide to produce a separate donor and sponsor recognition plan at the beginning of the planning process, which you will later incorporate into the project or program plan.

Projected Timeline and Key Milestones

The amount of time needed to complete an interpretation plan will depend on the type of plan. It will also vary from park to park, depending on a variety of factors such as availability of a current General Plan and/or related planning data, team members representing diverse resource disciplines, current and anticipated visitor needs, and other stakeholder input. It is not unusual for the planning process to take between 12 and 18 months. The following timeline and milestones are for preparation of a typical Interpretation Master Plan. The timeline and milestones for other types of plans will be similar. These can be adjusted to meet your park's circumstances and the type of plan you are producing.

Task 1: Assemble the Team (One month)

- Identify specific roles/tasks for each team member
- Review plan outline, projected timeline and key milestones
- Clarify the purpose of your plan and why it is being written now
- Identify the need for specialists. If hiring a contractor, begin drafting a Request for Proposals (RFP); if working with the Service Center, create a District Service Request.

Task 2: Research and Documentation (One to three months)

- Locate and review existing data and documents
- Assemble existing data for the planning foundation (Park Resources, Existing Interpretation, Local & Regional Influences and Visitation & Visitor Use)Identify any items that cannot be located and prepare a strategy to complete

Task 3: Stakeholder Input—Round One (One to two months)

- Identify current and potential audiences, stakeholders and partners (e.g. individuals, groups, organizations
- Determine appropriate method for gathering stakeholder input (e.g. meetings, focus groups, surveys)
- Prepare information for presentation at stakeholder meeting(s) (e.g. PowerPoint, table top displays, tour of the park)
- Gather stakeholder input on the park's existing interpretation, such as needs and special concerns, and overall vision for park interpretation.

Task 4: Assemble the Planning Foundation & Recommendations (One to three months)

- If not yet developed, complete Interpretive Direction (Goals, Themes, etc.)

- Team members develop Objectives, Strategies & Suggested Phasing

Task 5: Stakeholder Input – Round 2 (1 month)

- Review decisions made based on the previous meeting's stakeholder input.
- Acquire additional guidance on potential media, methods of delivery, etc.

Task 6: Write the Plan (1-4 months)

- Complete the plan's first draft; send for review by peers and management.
- Complete second draft if necessary and send for additional review.

Task 7: Final Plan approval and distribution (1-3 months)

- Make any final adjustments to complete the plan
- Circulate plan for final review and approval sign-off
- Prepare copies and distribute to stakeholders
- Place paper and/or electronic files, data, etc, in park Unit Data File (UDF)

While most stakeholder meetings only last for a few hours, be sure to allow yourself enough time to prepare. Contact the desired stakeholders 4-6 weeks before the meeting. Be sure to use more than one medium to contact them (e.g. if you send a letter, follow-up with an email and/or phone call). It is much harder for people to refuse to participate when they are speaking to someone in person. In the week before the meeting, follow up with a reminder, a map to the location and possibly an agenda. Be sure to allow yourself enough time to set up the site, and above all, don't forget to provide snacks!

1.3 ASSEMBLING A PLANNING TEAM

Who Should Be On an Interpretation Planning Team?

Planning requires a team approach from the beginning to the end of the project. It is important to determine who will be involved in the planning process, and have a lead team member to delegate responsibilities, ensure project deadlines and resolve conflicts. The size of the planning team will depend on the type and scope of the interpretive project. At some steps in the process the team might be larger as input is garnered from park staff, subject matter specialists, local community and interested constituencies.

The planning team may include employees in different disciplines, and stakeholders from the community.

A key step in assembling a planning team is to determine who will lead the project. This person should be well organized and competent in project management, interpretive planning and team facilitation. The project leader will be responsible for scheduling and facilitating meetings, keeping the project focused and on track, and ensuring tasks are assigned and completed. The project leader may also serve as the project manager-- responsible for project budget, schedule and implementation, or these tasks may need to be assigned to another staff person will be responsible for those tasks beyond the planning effort.

Planning team members may include park or district administration, district interpretive coordinators, state park interpreters, visitor services staff, curatorial staff, maintenance staff, contractors, subject matter experts and resource specialists, educators, cooperating association members or volunteers, community members, interested constituencies and any other stakeholders. Also, consider including staff from another district with similar resources and/or programs. See the “Assembling a Team” checklist on page 213 for more ideas of team members to include.

Interpretation and Education Division, Service Centers, and staff from other districts are also good resources in the planning process. They can provide everything from reviewing planning documents and assisting with facilitating stakeholder meetings to full Service Center management and involvement in the planning process. They also can provide

input regarding the planning process and how to avoid or overcome common planning pitfalls, particularly with regard to evaluating the need for contracted services and managing consultants.

The Role of Consultants on Interpretation Planning Teams

Specialized skills and services may be required to successfully accomplish an interpretation plan, including an interpretive services program/project plan. Consultant services should be considered and included, as determined necessary, in the overall Interpretation Planning Team.

In assembling the Planning Team, the identified project leader shall evaluate whether or not the Department or other state agency has the range of staff expertise, resources or staff time available in their work plans to carry out some or all of the necessary work components. Presented below are the steps involved in determining whether to contract for services and of what type (e.g., services, consulting, public entity, architectural and engineering, interagency, and/or public works), how to successfully contract for those services, and how to manage the consultant(s) who will be a necessary part of the team to successfully complete the interpretation project plan.

What Services Do You Need?

Identifying and assembling the project team also means considering whether you have appropriately qualified, in-house or other state agency staff to do all the necessary work within the funding timeframe for encumbering, expending and liquidating project funds. Many funds come with specific requirements and deadlines for staff labor charges, contract encumbrances and purchase orders. Project Managers need to factor into the project schedule the time to write, bid, award, and approve any and all contracts your project might require. A typical exhibit contract (over $5,000) often takes between three-four months to have a contractor selected and in place, ready to begin work. This is important to keep in mind when you have short-term funding.

Consider whether your project scope will require specialized consulting or A&E (architectural and engineering) Professional services. Refer to DPR's Contracts User's Guide for the most up-to-date information on the types of government contracts you may need to consider. Before you develop a consulting services contract, check with Acquisition and Development's Service Centers to determine whether the work can be performed in-house by staff interpreters, exhibit designers, curators and/or A&E professional staff. Document your request for in-house assistance by submitting a Service Request and/or obtaining written authorization by the Service Center's Division Chief using the DPR 943 form (Availability of Department Staff or Architectural and Engineering Services). If the Service Center is unable to provide some or all of the necessary services, you will be provided with a written response. Depending on the type of services needed,

you may have to check with other state agencies (e.g., Department of Water Resources, Department of Fish and Wildlife, state universities) to see if they have appropriate staff positions that can assist. Documenting the steps you have taken provides the required justification for pursuing contracted services.

Having determined that you will be contracting for services, there are several types of state contracts you might use. When the state estimated dollar value for contracted services is under $5,000, you will likely use a simple, self-invoicing STD. 285 Agreement for Services. Any service contract over that amount will use a STD. 213 Standard Agreement or an Interagency Agreement used between other government agencies or state offices. If the amount is between $5,000 and $250,000 and you have at least two California-certified small businesses or disabled veteran-owned businesses who have bid on the contract, you may use the Streamline Small Business/DVBE contract method. Ask your Contract Analyst for more information on this method, and how to determine if a particular business is certified.

Consulting Services, solicited and contracted via Invitation for Bids (IFBs) or Request for Proposals (RFPs), are most often used for interpretation planning or exhibit design services and justification typically falls under Government Code § 19130, establishing the use of personal services for contracts:

> *The services contracted are not available within civil service, cannot be performed satisfactorily by civil service employees, or are of such a highly specialized or technical nature that the necessary expert knowledge, experience, and ability are not available through the civil service system (Government Code § 19130(b)(3))*

A&E Professional Services, solicited by Request for Qualifications (RFQs), are often used to design necessary tenant improvements within visitor centers or accessible trail design. Refer to Government Code § 4525 et. seq. and California Code of Regulations, Title 14, §§ 4725-4736 for A&E Regulations. There are three circumstances wherein the RFQ process is appropriate:

- When your project requires the professional services of an architect, landscape architect, engineer, or land surveyor
- When your project requires environmental services
- When your project requires construction project management

Justification for A&E Professional Services: Agreement for Professional Services is authorized by Article XXII of California Constitution and Government Code § 4525 et seq. and is exempt from civil service restrictions.

A word of caution—do not have a service contractor do Public Works. Pursuant to Public Contract Code (PCC) § 10365.5(a), "No person, firm, or subsidiary thereof who

has been awarded a consulting services contract may submit a bid for, nor be awarded a contract for, the provision of services, procurement of goods or supplies, or any other related action which is required, suggested, or otherwise deemed appropriate in the end product of the consulting services contract. ..."

A Public Works contract is "an agreement for the erection, construction, repair or improvement of any public structure, building or road." (PCC § 1101). Restoring, improving, remodeling or building new visitor centers, museums, offices, or exhibit buildings are generally Public Works. Public Works requires licensed contractors and specific Public Works bidding and contract requirements. Note: Public Works contracts are awarded to the minimum qualified, low-bidder—no secondary method bidding is allowed (this contrasts with the RFP two part bid method below). Work with your Contract Analyst, Project Manager and/or check with the Service Centers to verify whether your overall project scope includes any Public Works aspects.

Remember, you may need more than one type of contract to complete your interpretation plan/project scope. Factor in the time to sequence the various types of contracts you may need to bid and coordinate with one another.

Once you've determined the need for contracted services, assign an appropriately trained staff person (that may or may not be you) to oversee the development of the consulting services contract and work with a DPR Contract Analyst to develop the appropriate type contract for the necessary services (see DPR's Contracts User's Guide). DPRs Contract Analysts will provide the most up-to-date contract templates with language approved by the Department of General Services (DGS). The template will include, for example, appropriate contract language for interpretive exhibit RFPs that include specification language on everything from exhibit writing standards, graphic conventions, exhibit casework materials, exhibit design and manufacturing standards, exhibit mount and other curatorial standards for displays. The templates contain standard language for phasing your particular scope of work for interpretive planning and exhibit design, fabrication, and installation, including training manuals, intellectual property rights and copyright permission documentation and product warranties. The template includes typical DPR language for CEQA and ADA compliance, Fire Marshal review and approval, and other citations to current, applicable laws, regulations, guidelines or departmental policies that will be included as part of the standard contract language.

Typically, contracts are solicited on the DGS BidSync website. Potential consultants who are seeking selected categories of work sign up on BidSync and can receive automatic notices when a RFP or RFQ is posted. They can go online and review the proposal and determine whether or not they wish to bid on the work.

For smaller dollar contracts, including those solicited through CA Small Businesses, it is often more efficient to seek bids from particular specialty firms by going directly to them

with your proposal. Potential Contractors can be found on the BidSync website; contact your Contract Analyst for details. They will need to be a vendor in the state of California (see DPR's Contract User's Guide). You want to make sure you have checked their previous work and references, just like you would do in the more formal RFP/RFQ process.

FINDING THE RIGHT CONTRACTOR

If you will be contracting a small job via a DPR 285 or using the Streamline Small Business/DVBE contract method, you can contact potential contractors directly and ask them to bid on the job. Sources to locate potential contractors include:

- **California's BidSync website**
- **California State Parks' Interpretive Providers Database http://www.parks.ca.gov/providers/**
- **The National Association for Interpretation "Green Pages" http://www.interpnet.com/resources_interp/greenpages/**
- **American Association of Museums "Museum Marketplace" http://museummarketplace.com/**
- **Companies advertising in *Legacy, Museum* and other trade publications**
- **Other park units or districts that have had good experiences with contractors**
- **Interpretive facilities outside of State Parks that have projects you like—ask who they used to do the work.**

Are you planning on using the Streamline Small Business/DVBE contract method, and a small California firm you want to ask to bid is not certified? Direct them to the DGS Procurement Division Certification web page at http://www.dgs.ca.gov/pd/Programs/OSDS/GetCertified.aspx, and ask them to complete the certification process.

For anything other than a small value, sole source contract, you will need two or more qualified staff to review and score the proposals. If the solicitation is for an RFP, use a two part bidding method that takes into consideration cost but does not determine the selected firm based solely on low bid. The reviewers are responsible for checking that the bidder meets minimum qualifications in submitting their proposal. They are then evaluated for 70% of their score on their demonstrated capabilities based on the company's fit for your project. Finally, the cost proposal is scored for no more than 30% of their score. The evaluation team needs to represent the skill sets being evaluated in the proposal (e.g., interpretive writer, exhibit designer and/or curator). They will be in the

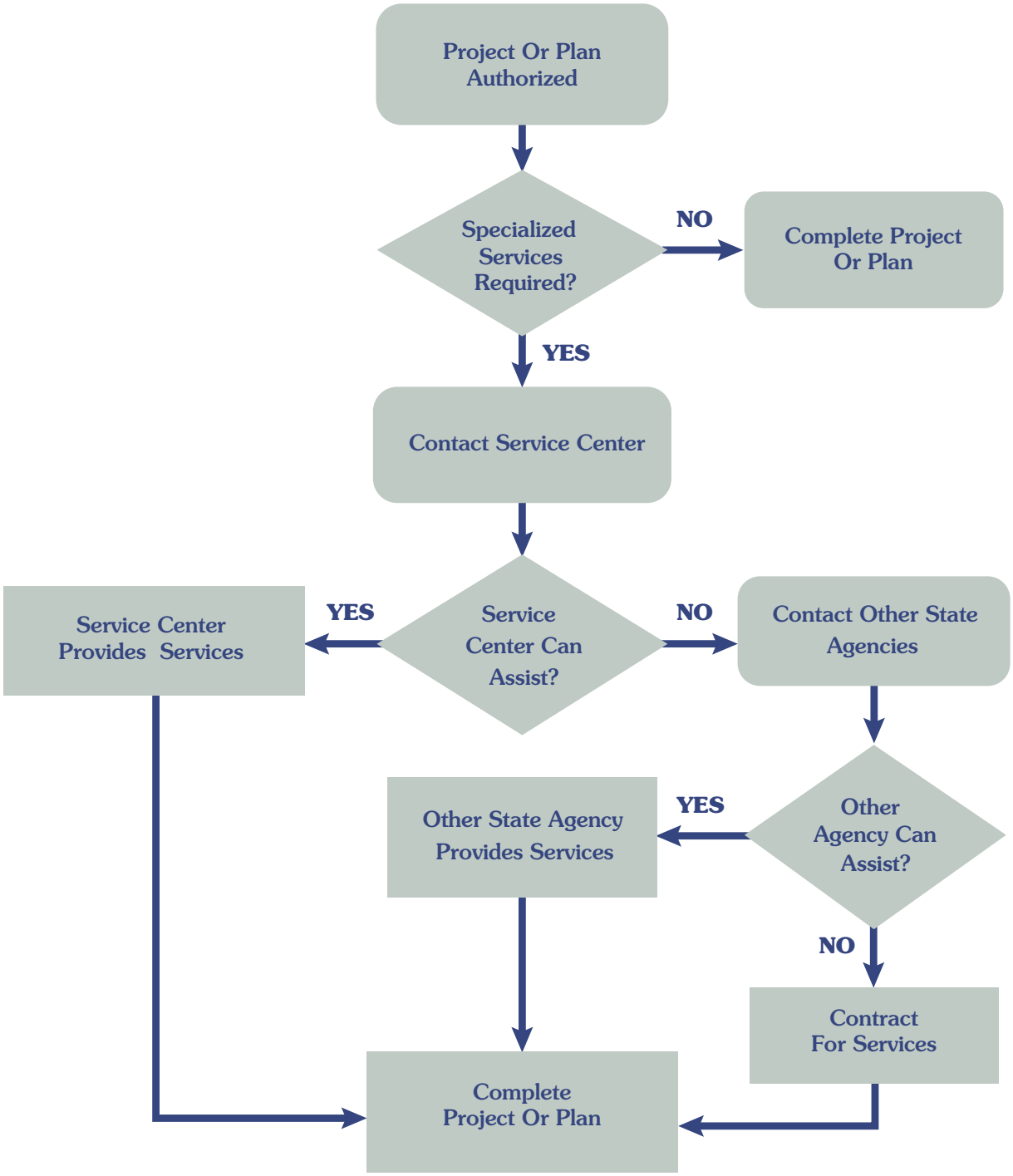
best position to document the strengths and weaknesses of each submittal sufficiently, if there are any protests during the intent to award period of the highest scoring bidder.

With the formal issuance of a Notice to Proceed (NTP), a state's representative is identified to be the single point of contact for the contractor. The state's representative is responsible for ensuring that the contractor is adhering to the agreed upon work schedule and schedule of values for making payment on invoices based on approved deliverables. The state's representative will also coordinate with team members and/or stakeholders involved in reviewing submittals, scheduling meetings regarding the contractor's work, etc. In determining who will serve in this capacity, keep in mind that contract oversight requires not only sufficient knowledge and experience, but time to manage the team and consultant’s work within the given contract period.

Identifying a qualified state's representative is particularly important for A&E Professional Service contracts as the state's representative or another team member(s) who is a licensed professional architect, engineer, and landscape architect will need to review drawings and submittals by outside A&E contractors. The Service Centers have licensed A&E staff that can serve in this capacity.

The A&E design services (whether in-house or contracted) produce a licensed, stamped, fully code-compliant Public Works bid package for construction, including any tenant improvements needed to support the interpretive exhibits projects. You need to have a professional Construction Manager and a licensed Construction Inspector overseeing code compliance over the general contractor's Public Works. Do not put DPR at risk by attempting to do this yourself or with inexperienced or unqualified staff.

Contract Decision Flowchart



1.4 BUILDING THE FOUNDATION

Gathering, Organizing and Analyzing Documents, Data and References

Research is fundamental to the preservation and understanding of California State Parks' cultural, natural and recreational resources. Research involves not only identifying the resources that make a place special, but also examining the scholarship concerning these resources. Systematically collecting, organizing and analyzing this data is an important step for any planning project.

Refer to past planning documents and the unit's General Plan, if available, then check other Department resources for information on the park unit and its resources before turning to outside institutions and resources. (See the "Planning Documents" checklist on page 215 for other types of State Parks documents to check.) Utilize on-line databases and all of your local research institutions and resources first to obtain information on your specific project. (See the "References and Resources" checklist on page 216 or more suggestions of where to research.) Once you have exhausted these sources, you should then consider visiting other more-distant institutions in person and researching in their collections. Refer to Appendix B for an annotated listing of some recommended institutions and websites that might be consulted when conducting research, both in-person and online.

SOME GOOD SOURCES OF INFORMATION

- **Unit and/or sector files and archives**
- **California State Library**
- **Unit and/or sector interpretive libraries**
- **California State Archives**
- **California State Parks Archives Digital Documents Catalog (also known as the Unit Data Files or UDF)**
- **Public and private libraries**
- **California State Parks Archives nondigitized materials**
- **Local historical societies or museums**
- **California State Parks Photographic Archives**
- **Department resource inventories**
- **Existing planning documents**
- **City, county or state property records**
- **Subject matter specialists: Historians, biologists, archaeologists, curators, etc.**

Differentiating between Primary and Secondary Sources

When collecting resource information, it is important to remember there are basically two types of data—primary and secondary. Both can be useful in interpretation, but there are advantages and disadvantages to each that should be considered before presenting the information to the general public. Primary sources are those that originated in the interpretive period or from a historical event that you wish to focus on, and can include letters, legal documents, and artifacts. Secondary sources are those that originated in a later time, and they generally analyze primary sources to give the reader insight into the historical context surrounding the object in question, including the historical causes and effects associated with that resource.

Secondary data collection is usually the first step during the process of gathering cultural or natural resource information on a specific subject or resource property. From these usually-published source materials, most often found in libraries, museums and archives, the researcher can better understand the existing scholarship on a subject, property, interpretive period or historical event. From these secondary sources, a researcher can identify the primary source materials that were used by the author/scholar of that work and the subject at hand.

Use caution when researching using the internet, just as you would when using printed sources. Be sure to seek out credible sources of information (e.g. websites of government agencies, universities or other trustworthy institutions, and peer-reviewed journal articles). Good internet sources include: the Online Archive of California (http://www.oac.cdlib.org/), California Department of Forestry and Fire Protection (www.fire.ca.gov), California Department of Fish and Wildlife (www.dfg.ca.gov) and the National Oceanic and Atmospheric Administration (NOAA) (http://www.noaa.gov/). See Appendix B, "Selected Research Institutions and Websites," for more good web sources.

Using primary sources is important when attempting to determine the biases of the creators of the secondary source materials of the various protagonists of the event. Primary sources are thus key to scholars in weighing the value and legitimacy of the documentation of the subject. For interpreters, primary source materials are not just good sources but may also prove invaluable in helping illustrate the varied viewpoints on a particular subject, individual or event. Primary sources often are a good tool for helping present controversial or sensitive subject matter to an audience.

When conducting research it is important to try to verify information using three different original sources. This reduces the potential for inaccuracies or misinformation.

However, sometimes there is only one source. For more research tips refer to Module 4 of the *Basic Interpretation Learning System* (BILS).

Identifying Significant Resources

Be sure to consult with appropriate subject matter specialists in order to incorporate the most recent understanding of the resources at hand.

Each unit of California State Parks is a unique mixture of cultural, natural and recreational resources. Often a property's acquisition and development as a park is a result of careful planning at a system-wide level to identify and fill gaps in the statewide resources inventory and take advantage of specific and exceptionally significant resources and recreational opportunities. In addition, the Department has also endeavored to establish new park units that embody the unrepresented or underrepresented facets of the state's vast natural and cultural diversity. The concept is that each park unit serves to strengthen the whole system in its goal to represent the best of California.

Each individual park unit contains a variety of resources, though the property may have been developed because of only a single, or a few, premiere resources. Crystal Cove State Park in Orange County for example, was purchased to become a state park because of its coastal beachscape. However, it also has a rich cultural history of thousands of years of Native American occupation, Japanese American agricultural use, and its establishment as a pioneering, early 20th-century recreational beach community. Beyond all of these aspects of the park, however, Crystal Cove also includes an expansive backcountry and an underwater park area, wherein the park protects a variety of important natural resources.

Before significant interpretive planning can occur, park personnel should gather resource data for all known resources. Refer to past planning documents and General Plans, if available. Whether you categorize these resources into primary or secondary importance for interpretive programming, a complete accounting of cultural, natural and recreational resources will ensure that your visitors have access to information on all that your park has to offer and will provide you with all the tools possible for interpretation. Thus, much research is required to gather the known inventory information for your park's cultural, natural and/or recreational resources.

Once this baseline resource information is acquired, keep park resource information in a central location, such as the UDF, so that it is accessible to interpreters and staff for reference. Interpretive resource data files will develop and expand over time as interpreters and resources staff contribute to it and as park resources are identified and records updated. Natural resources in particular are subject to constant change, and thus must be regularly monitored and recorded in the interpretive resource data files.

Cultural Resources

Cultural Resources are places or objects of local or national heritage. They can include historic sites and landscapes, archaeological sites, historic structures, monuments, artifacts, traditional cultural places and landscapes, significant cultural groups, seasonal celebrations and/or other human expressions of ethnic or national identity.

Department cultural resources specialists are the best persons to start with in acquiring information and reference materials for interpretive cultural resources data files. Cultural resource specialists include archaeologists, historians and curators. The duties and skills of these disciplines are not interchangeable. Some districts have one or more of these cultural resource disciplines represented on their staff. Specialists from the Service Centers and the Archaeology, History and Museums (AH&M) Division are also available to assist the field. Whether located at the District, Service Center or AH&M Division, the correct cultural resource specialist will know who to contact and where to start the search. They may also have important information as to the latest in the historiography of a subject and what are and are not, reliable sources on a subject or property.

Also recognize that most archaeological site record data is protected by law to safeguard from unauthorized collecting and/or vandalism of such resources. You will be required to consult with a qualified state archaeologist as to what data is allowable for your reference files.

Regularly check with natural resource specialists for the latest information.

Natural Resources

Natural Resources can include a wide variety of features. Your park's climate, scenic points, topography, vegetation, animals, water sources, habitat, geologic features and processes, seasonal and historic changes, and the relationships between various species and the environment are all legitimate subjects for interpretive resource data files.

Many Districts have staff environmental scientists assigned. Contact these specialists to access the latest in resource data and scientific scholarship on natural resource information for your park or project areas. As research on the status of natural resources is often changing, it is important to regularly check with natural resource specialists for the latest information on a topic or subject.

Recreational Resources

Recreational resources are those outdoor features in a park that define a person's experience and are often the motivating factor for a person's visit to a park. Recreational resources can include accessible natural and cultural resources, special values attached to an area, facilities and infrastructure such as trails. When gathering data on a park's recreational resources consider how and where visitors are utilizing the park. What activities are they participating in? What different user groups are present? What are the potential recreation uses within the park? Picnic areas, swimming areas, trails, campfire centers, etc., are all examples of the recreational assets that should be identified.

Assessing Existing Conditions

Existing Interpretation and Education

A clear picture of current interpretation in and around the park is essential for writing an effective interpretive plan. As you gather information on the current interpretation in the park, conduct an existing interpretation inventory. Through the interpretation inventory, planners determine what interpretation resources and services are already present for the park, and their condition and effectiveness. The information gathered during the existing interpretation inventory will influence the development of the interpretive goals, objectives and strategies later in the planning process.

The existing interpretation information included in an interpretive plan will vary, depending on the type of plan and the complexity of the park's interpretive programs and facilities. While an interpretation master plan will have a substantial section on existing interpretation, an interpretation service plan will probably have just a brief section that gives the context into which the new interpretive service will fit. Either way, even if most of the information is not included in the final plan, it is important for the planners to understand what is already there before changing it or adding something new.

When conducting an existing interpretation inventory, look for personal interpretation, interior and exterior exhibits, facilities used for interpretation, publications, audiovisual interpretation, and remote interpretation such as websites and social media. The best sources for this information are park and district interpretation personnel. See the "Existing Interpretation and Education" checklist on page 217 for more types of interpretation that may exist at the park.

Accessibility

Accessibility refers to the ease with which park visitors can experience all the attractions at a given park. Generally, but not always, this term is applied to visitors who have physical limitations or disabilities, including those who are vision or hearing impaired. Due to the importance of maintaining ADA compliance and the increasing number of persons with physical limitations, accessibility concerns have become a vital consideration in interpretive center design, expansion, program planning and maintenance.

In 1990 the Americans with Disabilities Act (ADA) became law. It requires that people with disabilities be allowed to participate in regular programs and that they cannot be discriminated against or treated separately because of their disability. In compliance with this law, parks may not refuse to allow a person to participate in a service, program or activity simply because the individual has a disability or because the facilities are not accessible. The policy of California State Parks is to meet the recreational needs of all visitors and to provide an accessible environment within state parks.

California State Parks' publications *All Visitors Welcome* and *Accessibility Guidelines* (2009 Edition) contain recommendations, guidelines and minimum standards for accessibility in interpretive programs. *All Visitors Welcome,* revised in 2011, provides detailed background information on disabilities, including hidden disabilities and the needs of older adults and visitors with limited English proficiency. It also gives specific recommendations for a variety of interpretive services and how to make them accessible. In addition, the book provides resources for products, services and organizations that are available to assist with ADA compliance.

The Department's Accessibility Section must be a vital member of the interpretive planning process to ensure access is adequately integrated. An initial consultation with Accessibility Section staff before planning begins can provide valuable insight into existing or potential areas (physical and programmatic) of concern. Continuous communication with, and evaluation and review by, Accessibility Section staff during the planning process will help to ensure compliance with accessibility mandates.

Local/Regional Resources

State parks don't exist in an interpretive vacuum. Parks can influence or be influenced by nearby interpretive sites and organizations. Be sure to inventory local and regional interpretive resources. What other institutions in your area provide interpretive resources? What types of interpretive resources do they offer? How closely do their interpretive resources align with yours? How do they complement? In what areas is there an opportunity to provide new interpretive programming or resources? See the "Related Resources and Interpretation" checklist on page 218 of Appendix E for ideas of what to look for.

Identifying Your Audience

Identify who uses interpretation and why, and who does not use interpretation and why.

An important element that must not be overlooked in the research phase of interpretive planning is your audience. It is vital to understand who your audience is and what their expectations are. The research phase of a successful interpretive plan will include a current, up-to-date, well designed visitor study that identifies: who is presently using the park, who is not and why, and what visitors you would like to attract. Other questions to consider include: what brings visitors to your park? What are their patterns of use? How long do they plan to stay? What do they gain or hope to gain from their visits?

Demographic data about existing and potential audiences or populations can be acquired from U.S. census data, California Department of Finance Demographic Research Unit data, tourism and visitor bureaus and school systems, among other sources. (See the "Demographic Data Sources" checklist on page 219 of Appendix E for more suggested sources.)

Consider using a university graduate program to design and conduct a visitor survey. This can be a cost-effective way to get quality work performed by graduate students under the guidance of university teaching staff. Try natural resource, forestry, community studies, social science, sociology, geography and parks & recreation programs when looking for potential survey providers. Don't limit your search to California schools, and remember distance education programs such as Stephen F. Austin University's Resource Interpretation masters degree program.

Another lower-cost way to accomplish visitor survey work is via an interagency agreement with a public agency such as the National Park Service Social Science Division or U.S. Forest Service Research Stations.

Some of these organizations provide information as a public service but others might be willing to share their proprietary data.

Information about your park's current audience demographics can be gathered on-site from formal visitor surveys conducted by a contractor, university or research organization. Informal data gathering includes methods such as guest book signatures, observation by park staff and volunteers, or informal surveys.

While we can make generalizations about audiences based on demographic data, identifying the motivations, wants, needs and interests (known as "psychographics") of specific audiences is more helpful for interpretive planning. Visitors bring with them their own perception of the world. Understanding what motivates visitors to come to parks and to seek out interpretation will enable you to use the best strategies and methodologies for reaching your audience. To gather information about visitor motivations, experiences, expectations, attitudes, etc., research can be conducted through:

- Informal conversations
- Observations
- Surveys
- Interviews
- Workshops
- Focus groups

This research is particularly important in understanding the needs of unrepresented or underrepresented groups, why they may not be using park resources, and how we can better serve them. See the "Park Visitors' Profiles" checklist, page 220, for a list of visitor traits to consider recording.

ORGANIZING AND ANALYZING THE RESEARCH AND DATA

As you do research, be sure to record in detail the sources of your information. The more detail provided, the easier it will be to evaluate the credibility of the information and for someone to access that source at a later date. Keep notes from your research in an organized, consistent and systematic manner. Notes and research files of both primary and secondary sources should be collected, organized and retained as hard copies in the park interpretive resource data files and electronically in places easily accessible by others, such as Unit Data Files (UDF).

Existing Interpretation Special Concerns

Documenting the current status of park interpretation and identifying related needs will help to justify many of the plan's recommendations. For certain interpretation planning documents (e.g. the Interpretation Master Plan) you will consider the Special Concerns listed below when assessing the existing interpretation. The appropriate information will be included in the Analysis discussion for each of the Existing Interpretation categories that follow:

- **Barriers (e.g. physical, language, economic, accessibility):** Are there any barriers to access to public locations and programs in the park for visitors of varying abilities? If so, identify them. What steps could be taken to make them more accessible? (See "Accessibility" checklists on pages 221-223)
- **Revenue (e.g. fees, sales, concessions, special events, donations):** What types of revenue sources are generated by interpretation? Are there programs, activities and facilities that could potentially provide new or expanded revenue sources? If so, identify them. (See "Revenue Generation and Alternative Facility Uses" checklist on page 224)
- **Public Safety:** Are there potential hazards to the public that should be considered when developing interpretive services? If so, identify them. Are there locations in the park that pose public safety risks (or may appear to do so) for visitors? If so, where/what are they and what could be done to lessen those risks or better inform visitors about them? (See "Safety and Security" checklists on pages 226-227)
- **Park Security:** Are there any security concerns related to the safekeeping of the interpretive resources and facilities in the park? If so, identify them. (See "Safety and Security" checklists on pages 226-227)
- **Environmental Factors:** Are there any environmental issues, such as weather and seasonal changes, that may impact either visitors taking advantage of interpretive offerings or the actual interpretive resources, collections or facilities? If so, identify them.
- **Maintenance:** Will the interpretive resources, collections and/or facilities be subjected to an inordinate amount of use or be at risk of misuse or intentional vandalism?
- **Use of Facilities and Equipment:** Can or will the interpretive resources, collections or facilities be used for other purposes beyond that of interpretation in the park? If so, what are those other uses and how could they impact the resources, collections or facilities? (See "Related Use of a Space/Facility" checklist on page 228, and "Revenue Generation and Alternative Facility Uses" checklist on page 224)

1.5 IDENTIFYING EDUCATIONAL CONTENT STANDARDS

California's school children represent the park system's most consistent and diverse visitors.

Specifically planning to provide interpretive services to schools and schoolchildren is an important part of the planning process. California's school children represent the park system's most consistent and diverse visitors. Programming for school groups should provide hands-on and/or interactive learning opportunities, accommodate different learning styles, and support the needs of the educational community. It is important for interpretive planners and presenters to stay abreast of current educational trends and initiatives at a national, statewide and local level in order to most effectively meet the needs of the educational community. Being aware of educational trends, initiatives and challenges will enable you to plan more effective school group programs and potentially broaden the park's impact and role in the educational community.

Understanding Content Standards

California educators use an established set of standards and frameworks to guide their teaching and assessment of students. Academic content standards define the knowledge, concepts and skills students should acquire at each grade level. Educational frameworks are the blueprints for implementing the content standards.

In August 2010, California joined other states in adopting the Common Core State Standards. The Common Core State Standards were developed to establish consistent and clear standards for English-language arts and mathematics. Strengthening existing standards, the Common Core State Standards are designed to be relevant to the real world, reflecting the knowledge and skills today's students will need to succeed in college, careers and today's global economy. Literacy standards that focus on reading and writing instruction during history/social studies, science and technology are included, allowing a cross-curricular approach to teaching. The Common Core State Standards are being phased in. Full implementation is expected in 2014-2015.

All programs developed for school groups must be aligned with the State of California educational frameworks, their associated academic content standards (see DOM § 0904.6.16), and the newly adopted Common Core State Standards. Any information provided to teachers about a specific program (such as teacher's guides, information

packets, etc.) should reference which specific academic content standards are met. The State of California educational frameworks and academic content standards, and the adopted Common Core State Standards are available on the California Department of Education website (www.cde.ca.gov).

Involving someone from the educational community, specifically teachers or curriculum specialists, is vital when planning or developing school group programs or materials. An educator can help to ensure the content or program will appropriately address academic content standards, are suitable for the identified grade level(s) and meet educational needs. For more information on working with the educational community contact the Interpretation and Education Division.

All programs developed for school groups must be aligned with the State of California educational frameworks, their associated academic content standards and the newly adopted Common Core State Standards.

Use the information gathered about your current audience to identify what grade levels traditionally attend school group programs. This information will allow you to more effectively evaluate existing programs and materials to determine if they are sufficiently meeting the academic content standards for those grade levels. During the planning process to expand existing school group programs or develop new ones, consider the following questions:

- What primary or secondary interpretive theme(s) and/or interpretive message(s) do you want children to know?
- What academic content standard(s) correlate with the chosen theme(s) or messages?

If you are at a historic park, explore not only the History-Social Science content standards, but the Science standards as well. The same applies to parks rich in natural resources; consider the History-Social Science standards when addressing human impact.

- If you want to expand school group programming beyond the grade level of your traditional school group audience, examine what other grade levels have content standards that correlate with the chosen theme(s) or message(s). Content standards build on a student's previous knowledge of a subject over the course of several grade levels.

- What essential understandings (big ideas) of the interpretive theme or message do you want students to know, understand and/or demonstrate?
- What learning experiences and activities would help students achieve the essential understandings

Aligning school programs with the Education and Environment Initiative (EEI)

Mandated by legislation AB1548 (Pavley, Chapter 665, Statutes of 2003) and AB 1721 (Pavley, Chapter 581, Statutes of 2005), the California Education and the Environment Initiative (EEI) Curriculum is an environment-based curriculum that is formally approved by the State Board of Education for use in classrooms statewide. Comprised of 85 units, the goal of the EEI curriculum is to increase environmental literacy for California's Kindergarten through grade twelve students by teaching science and history-social science academic content standards to mastery within an environmental context. The first of its kind, the EEI curriculum has been collaboratively developed by a multi-agency education and environmental partnership.

EEI CURRICULUM ENVIRONMENTAL PRINCIPLES:

Principle I: People Depend on Natural Systems

The continuation and health of individual human lives and of human communities and societies depend on the health of the natural systems that provide essential goods and ecosystem services.

Principle II: People Influence Natural Systems

The long-term functioning and health of terrestrial, freshwater, coastal and marine ecosystems are influenced by their relationships with human societies.

Principle III: Natural Systems Change in Ways that People Benefit from and Can Influence

Natural systems proceed through cycles that humans depend upon, benefit from and can alter.

Principle IV: There are no Permanent or Impermeable Boundaries

Decisions affecting resources and natural systems are based on a wide range of considerations and decision-making processes.

Principle V: Decisions Affecting Resources and Natural Systems are Complex and Involve Many Factors

Decisions affecting resources and natural systems are based on a wide range of considerations and decision-making processes.

California State Parks is mandated by the California Education Code and the California Public Resources Code to incorporate the Environmental Principles and Concepts outlined in the EEI Curriculum into all K-12 environmental education-related materials.

The Environmental Principles and Concepts, and EEI curriculum are online at www.CaliforniaEEI.org.

California State Parks has created lists of park connections for specific EEI units, available on the "Teach the EEI Curriculum with State Parks" web page at http://www.parks.ca.gov/?page_id=26907

These lists will save you time by showing which units have already been identified as pertinent to your park.

Illustration by Morrie Turner

Aligning programs with the EEI Curriculum will help get more children out in your park.

1.6 INVOLVING STAKEHOLDERS

Make an effort to bring the public into the planning process. Your team should respond not only to department requirements, but also to the interests and concerns of stakeholders and interested parties. In the long run, such public involvement can save time and money, and may produce a better interpretive project, better meeting the needs of the park, community and visitors alike.

Keeping the lines of communication open is important to a park constituency's perception of a project and its satisfaction with it. Contact should be initiated to gather information from, and to inform, the public about the interpretive planning that is proceeding. Among other things, this involvement can include opportunities for feedback on test prototypes, community meetings and talks with interested parties.

As defined by the National Association for Interpretation, a stakeholder is a person who has a vested interest in a place, program, issue or process. Stakeholders may be park employees, user groups, docents and volunteers, neighbors, concessionaires, cooperating associations, government agencies, local ethnic and cultural groups, educational community and community decision-makers.

For more ideas on ways stakeholders can be involved in the planning process, see the "Public Involvement" checklist on page 230.

Native California Indian Consultation

While involving stakeholders in planning interpretation is always a good idea, there are some instances in which doing so is mandatory.

In working with Native California Indians for instance, California State Parks "recognizes its special responsibility as the steward of many sites of cultural and spiritual significance to living Native peoples of California." The Department "therefore maintains a policy to engage in open, respectful, ongoing consultation with appropriate California Indian tribes or groups in the proper management of areas, places, objects or burials associated with their heritage, sacred sites and traditional cultural properties or cultural traditions in the State Park System. (Departmental Notice No. 2007-05).

The Department's commitment to formal consultation with Native California Indian peoples includes obtaining their input on the interpretation of their own cultural heritage. Formal consultation is especially required when presenting Native California Indian peoples "in the native voice." This is essential to avoid replicating inaccurate interpretations of Native California Indian peoples and their culture in the past. Such images, documents and representations as those propagated in popular culture and biased scholarship oftentimes resulted in inaccurate, stereotypical and demeaning representations of Native California Indians--interpretations that usually did not include

Native peoples' input or perspectives. For the best results, include representatives early on, as collaborators—not just as sources or approvers. Include them not only in interpretive services planning, but also in the development of interpretation management plans.

When planning interpretation of Native California Indian culture(s), first contact a department State Archaeologist or cultural specialist experienced with Native American consultation policies and practices. Most California State Park archaeologists or cultural resources specialists have undertaken or know who can assist with obtaining contact information for specific California Indian groups associated with your park or project property from the California Native American Heritage Commission (NAHC). (The NAHC is the State of California's mandated keeper of the list of recognized Native California Indian groups).

Interpretation of Native California Indians must include their input and perspective. Ideally, they will also be participants.

It is also advised to take advantage of the already-existing relationships that the Cultural Resource Specialists have with specific Native California Indian groups and their individual representatives. These long-term relationships have proven invaluable in locating, making contact with, and communicating openly with Native California Indian peoples.

For all these reasons, it is not advised to undertake Native American consultation for your interpretive plan without contact and input from a department cultural specialist.

Input from Culturally Diverse Constituents

Similarly, people of many cultural backgrounds may have a traditional affiliation with your project's park, project property or area.

For this reason, you must be diligent in identifying, locating and consulting with groups whose cultural systems or ways of life have an association with the park that your project may be interpreting. These cultural constituency groups may include contemporary park neighbors, ethnic or occupational communities (e.g. mining, ranching, logging), long-term recreational users, those associated with specific historical events or activities

that occurred at the park, and former residents or descendants who retain an affinity or personal connection to the property and its cultural past.

Consultation with such park cultural constituency groups is essential in gathering a broad and balanced approach to your interpretive planning. Departmental policy requires that the content of interpretive and educational services be well-researched and as historically and culturally accurate as possible while attempting to be free of cultural, ethnic or personal bias. In order to develop interpretive programming to meet these goals, rigorous academic research from a broad set of primary and secondary sources is required—but not the only task to be undertaken.

Especially when dealing with sensitive or controversial subjects it is important to gather and consider all points of view from associated cultural constituents. Input, advice and counsel of not only factual data and subject matter experts, but those with cultural affinities, will provide invaluable information and perspective on the importance, approach and relevant aspects of a subject to be presented.

These collective and personal "sources" provide a human element to the objective facts that form the foundation of any scholarship. Even if such input may prove to be full of factual inaccuracies, constituents' collective myths and personal perspectives can provide helpful context for understanding a community's relationship with such topics. This data can be important in testing and confirming your interpretive planning efforts.

Subsequently it is also departmental policy that to ensure appropriate and balanced content, regular input and guidance from associated cultural constituency groups be sought during the planning, development and presentation of interpretive and educational services and activities traditionally associated with those groups. This includes higher-level planning such as Interpretation Master Plans and Action Plans for parks that include cultural resource, history and present-day connections to a group or groups. For help in identifying and engaging with such cultural constituent groups, canvass district and park operations, interpretation and resource specialist staff for names and contacts.

While it is important to include representatives of cultural groups for the information they can provide and to make sure they approve of the final product, again, you will achieve the best results by collaborating early and throughout the planning process.

For further discussion of interpreting diversity and consulting with representatives of associated communities contact the Interpretation and Education Division.

Input from People with Disabilities

People with disabilities have interests as broad as the general population and yet these important stakeholders can provide valuable insight to aid in making interpretive

programs accessible to all visitors. Their input at the first stages of planning will help ensure that accessibility is woven seamlessly into your plan as opposed to an apparent afterthought, and often when consideration is given to the varying abilities of your audience unique interpretive methods emerge that involve all of the senses.

Consultation with your District Accessibility Resource Group, (DARG) is the first step in involving members of the disabled community, and nearly all counties have Independent Living Centers. These are typically nonprofit, community-based organizations that provide services and advocacy by and for people with all types of disabilities. Including people with disabilities in planning will also raise awareness of accessible recreational opportunities among this underrepresented constituency.

Involve people with disabilities from the first stages of planning, to ensure that accessibility is woven seamlessly into your plan.

Methods of Involving the Community and Constituent Groups

Contact should be initiated from the beginning of the planning process to gather information from and inform the public and constituent groups about the interpretive planning that is proceeding. The local community, stakeholders and constituent groups can provide valuable input and feedback throughout the process of identifying park significance, important themes and stories, desired visitor experiences, media choice priorities and new audiences. Including the community and constituent groups can also increase support for the park, the plan and future projects, provided that people perceive that their input is really being listened to and considered. Connections made with other organizations during the planning process can lead to valuable partnerships in the future.

Consider the following opportunities for involving stakeholders:

- Providing input on their needs, preferences and ideas for park interpretation and education
- Serving on the Planning Team
- Identifying information related to park resources and park visitors
- Assisting with the assessment of existing conditions, issues and opportunities

- Describing influences via community involvement and interpretation providers
- Reviewing drafts of the plan

Methods for involving the public in the planning process include:

- Meetings
- Workshops
- Focus groups
- Organizational meetings
- Visitor and online surveys (these need to be scientific surveys—well planned, worded, etc.)
- Informal conversations

Information about public workshops or meetings can be shared in many ways: e.g. the internet, mailings, organization newsletters, media releases, public service announcements, educational speakers on cable. A primary contact or spokesperson representing an organization or special interest group is the most effective way to provide information about the interpretive planning process and project (see DOM 0902.3 – 0902.3.1).

Public input can be gathered in a number of ways, including workshops and meetings

Some tips to aid the process of soliciting input:

- Communicate broadly with people, especially community leaders. Coordinate opportunities to talk about the interpretive plan at the meetings of service organizations.
- Promote the community and partner benefits.
- Establish clear lines of communication between the core interpretive planning team and others involved in the planning process.
- Set clear meeting agendas and distribute agendas in advance.
- Follow up with newsletters, web page posts or individual communications summarizing input so people know they were heard.

The community and stakeholders can share their feedback with the interpretive planning team through interviews, focus groups, consensus-building meetings and workshops, response cards, comment books, online surveys and letters. Input from park visitors can be garnered by the interpretive planning team through informal observations, conversations and visitor surveys. Mock-ups and prototypes are another way to test visitor reactions to proposed ideas.

1.7 FRAMING THE INTERPRETIVE DIRECTION

Developing Interpretive Goals and Objectives

Determine what it is you would like to accomplish with your planning outcomes. Written statements of goals and objectives will become the basis for program policies, evaluation criteria and eventually the definition of success. They will also provide the public with a clear understanding of the role and purpose of the planning outcomes, whether they be interpretive projects, personal interpretation or any of the many potential outcomes of an Interpretation Master Plan. Every interpretation master plan or interpretive service plan, no matter the size or simplicity, should include goals and objectives. Often, such terms can be confused. What, one might ask, is the difference between an objective and a goal? Therefore, California State Parks interpretive planners have developed the following for use in this workbook and throughout the department as our standard set of terms and definitions:

Goals build off the vision and mission statements stated in a unit's General Plan, if there is one. Goals are broad, general concepts that describe the ultimate purpose, aim or intent of your interpretation.

Goals are not necessarily measurable. They are the big picture, the overall results that interpretation should achieve.

Goals are often found in unit General Plans. When this is the case, they are restated and possibly updated and expanded in an Interpretation Master Plan. If goals are not outlined in General Plans, they are developed during the planning process for Interpretation Master Plans and/or Interpretive Services Plans.

Guidelines are found in some units' General Plans or Prospectuses. In the General Plans, the role of the guidelines is to provide direction for accomplishing goals. If present, guidelines can be used to help develop goals, objectives and strategies for Interpretation Master Plans, but are not included in any other plans except General Plans.

Objectives are specific, realistic and measurable results that interpretation will achieve and that contribute to the accomplishment of a goal.

Objectives are developed from the goals. Objectives for an Interpretation Master Plan should be restated in the Interpretation Action Plan. Guidelines outlined in the unit General Plan should be consulted as well when developing objectives.

Strategies are the approaches used to accomplish one or more objectives. Strategies are specific and measurable. In an Interpretation Master Plan, strategies are not prioritized and should be identified in general, not location-specific, terms. In an Interpretation Action Plan and Interpretive Services Plans, strategies are prioritized and can get more specific.

Tasks are the specific steps needed to carry out particular strategies.

The description of the task should identify as much supporting information as required to allow the successful accomplishment of the task, for example: the person(s) responsible for accomplishing the task, and the resources needed to accomplish the task. The level of detail depends on the type of plan. Tasks are listed and prioritized in Interpretation Action Plans, Annual Implementation Plans and in Interpretation Project/ Program Plans.

EXAMPLES OF GOALS, OBJECTIVES AND STRATEGIES

Goal 1: Interpretation will illuminate the significant resources of the park so that visitors understand why it is a valuable natural, cultural and recreational landscape.

Objective: Provide Interpretation at significant resources sites throughout the park.

Strategy: Identify and establish "Sensitive Resource Interpretation Areas (SRIAs)" throughout the park.

Goal 2: A wide range of visitors will participate in interpretive programs at the park.

Objective: Interpretive services provided at the park will be accessible to all visitors.

Strategy: Present interpretive materials and programs using methods accessible to a wide variety of abilities.

Identifying Interpretive Period(s)

The **Interpretive Period** sets the historic framework for interpretation within a park unit, directing and focusing interpretive themes, facilities and activities to represent specific years. The Interpretive Periods should be identified in the park unit's General Plan or interpretive prospectus, if either has been developed. There may be one or more primary as well as several secondary interpretive periods for the park. Interpretive periods are only set for historical interpretation, not for natural resource interpretation.

Below is an example from Shasta State Historic Park's General Plan:

Primary Interpretive Period: 1849-1895:

Shasta State Historic Park shall represent a flow of history that captures the essence of the Gold Rush and its effect on the Shasta area. The primary period, 1849 to 1895, encompasses the community's swift rise, and growth as an economic and political base, to its long, slow decline. Significant years within the primary period of Shasta City will be represented at different locations in

the park to demonstrate in three dimensions, the flow of history. These periods include the following years:

1849-1850, representing the early Gold Rush community as a booming village of tents and log cabins;

1852-1865, portraying Shasta City at the height of its economic and political strength, but before merchandising practices were affected by the Civil War;

1878-1895, illustrating the community through its decline, with its surviving businesses.

Secondary Interpretive Period, Prehistory–1848:

A secondary period encompasses the long era prior to the discovery of gold in northern California, allowing for the interpretation of the Wintu during the pre-contact period and a discussion of the impact of early trappers and Anglo-American settlers on the area.

Secondary Interpretive Period, 1895–Present:

The twilight years of Shasta, its rediscovery, and the efforts to restore and preserve the historic community will be encompassed in this secondary interpretive period.

Articulating Interpretive Themes

What's a Theme?

The best interpretation is characterized by a clear sense of purpose. Theme statements provide a point-of-view or an approach to a particular subject. They are concise. The best theme is a simple, complete idea that defines the informational scope and the perspective to be offered. Interpretive themes offer a bridge for visitors to help them understand the significant natural, cultural, and recreational resources of a park. Listed below are the various types of themes, accompanied by working examples from four different parks.

A **unifying theme** or overall theme is used when planning park visitor centers or multi-subject exhibits. The unifying theme provides a conceptual focus and general approach for the interpretive offerings. It establishes the overall tone and direction and implies the desired outcome interpretation should have on visitors' attitudes and perspectives. The unifying theme is presented through the interpretation of the primary, secondary, and supporting themes.

Each exhibit station in a visitor center, interpretive trail, or touch screen program requires a separate point-of-view or primary theme which complements the unifying theme.

Examples of Unifying Themes:

- "On the California frontier, converging cultures transformed San Diego from a Mexican pueblo into an American town."—*from Old Town San Diego SHP Strategic Plan for Interpretation*
- "Colonel Allensworth and the community of Allensworth represent a significant chapter in the history of African Americans in California and the United States." —*from Col. Allensworth SHP Interpretive Master Plan*

Primary themes define the most essential ideas, like the chapters in a book. Primary themes carry the common thread of the unifying theme to tell a complete story.

Examples of Primary Themes:

- ""Año Nuevo State Park is a refuge for species living on the edge of extinction." —*from Año Nuevo State Park General Plan*
- "Increased development marked the end of the frontier era and Old Town's decline." —*from Old Town San Diego SHP Strategic Plan for Interpretation*
- "The life of Allen Allensworth, from being born into slavery to retiring as a Lieutenant Colonel in the U.S. Army, shaped his convictions for freedom and equality of African Americans in America, and led to his vision and founding of an African American community."—*from Col. Allensworth SHP Interpretive Master Plan*

Supporting themes (also called **subthemes**) provide more detailed perspectives on one or more of the primary themes.

Examples of Supporting Themes:

- "Improved transportation brings the frontier era to a close"—*from Old Town San Diego SHP Strategic Plan for Interpretation*
- "The experiences of Colonel Allensworth shaped his ideas for a practical place for African Americans to live outside the envelope of social perceptions of what African Americans were capable of and allowed to do." —*from Col. Allensworth SHP Interpretive Master Plan*

Secondary themes provide valuable, but non-essential information related to the unifying and primary themes. Like sidebars or footnotes in an article, secondary themes may be only tangentially related to the unifying theme.

Examples of Secondary Themes:

- "Old Town's legacy reflects the development of heritage tourism in San Diego and the preservation movement." —*from Old Town San Diego SHP Strategic Plan for Interpretation*
- "The natural environment of the San Joaquin Valley provided the community of Allensworth with both challenges and advantages in the development of agriculture." —*from Col. Allensworth SHP Interpretive Master Plan*

REMEMBER:

- **Themes must relate to visitor interests, the resources and the mission of the park.**
- **Themes need a clear point of view expressed as a simple statement or question.**
- **Themes should show relationships and processes—not just facts.**
- **Individual themes should contribute to a memorable "take home" message (the unifying theme).**
- **While themes should not be just facts, they must be accurate. Have all themes reviewed by subject matter experts.**

1.8 EVALUATION IN THE PLANNING PROCESS

"Is my project or program successful?" To answer this important question, you need to evaluate. Other important questions to ask or consider are "What will make my project or program successful," and "Am I on the right track to make my project or program successful." A well-thought out program or project plan will include an evaluation plan for studies that will answer all three questions, and the commitment to modify the project/program as needed based on evaluation results.

Evaluation has other valuable uses. An evaluation report can be used to justify a project, attract funding for further development, or satisfy requirements of grant-providers or upper management. It documents project accomplishments for institutional memory and for use in future project/program planning.

Planning and implementing a new project or program takes substantial time and resources. Spending a comparatively small amount of time and resources to write an evaluation plan and then evaluate the project/program in a systematic and effective way will be more than worth the effort—provided the evaluation results are constructively used.

Types of Evaluation

Evaluation can be divided into three main types:

- Front-end
- Formative
- Summative

Front-end evaluation is designed to answer the question, "What will make my project or program successful?" As its name says, it is done right up front, before determining final project or program specifics. Good front-end evaluation will assist you in determining how best to achieve your goals and objectives with the target audience, and can help you refine your definition of that target audience.

Formative evaluation addresses the question, "Am I on the right track?" It occurs during development, before project details are set in (expensive) stone, or a large docent group is trained to do a new program. A typical and useful way to conduct formative evaluation is to test a prototype on a sample audience, observe their behaviors, and gather written or oral feedback. The project or program is then improved based on the audience reaction and feedback. Peer review of a draft interpretive services plan is also a useful formative evaluation tool.

Summative evaluation answers that typical "Is my project or program successful?" question. Summative evaluation is always useful for gaining knowledge that will inform future planning efforts and add to your understanding of your audience. It can point

out needed changes in a personally-presented program. But it has a major drawback with expensive projects—what do you do if the answer is, "No"? Hundreds of thousands of dollars and many person-years may have been expended on an exhibit that is not effective and cannot easily (or cheaply) be changed.

There is a fourth type of evaluation, a sub-category of summative evaluation: Periodic

Periodic evaluation is summative evaluation that is repeated at regular intervals to ensure that the interpretation quality is consistent or improving, and that goals and objectives continue to be met. Periodic evaluation is most useful for personally presented programs because these can most easily be changed. It is often used to help individual program presenters evaluate and improve their own interpretation techniques. It is also useful for determining if an older project is still meeting current needs, or if it is time to plan for replacement or alteration.

Evaluation Methods

There is a wide variety of evaluation methods, including some you may have never even thought of as being evaluation. Some of these methods are relatively simple for anyone to implement, some are more difficult to do correctly and are best done by professionals. Some are more accurate than others. Some are best for front-end evaluation, some for formative or summative, and some are appropriate for all three types. The evaluation methods that you use will depend on the audience sample (for example, you would not give a written survey to young children), which type of evaluation you are doing, your expertise, time available, desired knowledge and budget. But even with a slim budget, limited expertise and little time, you can perform a useful evaluation. While a professionally designed and conducted full evaluation may give much better results, if you just don't have the means to do this, conducting your own evaluation is certainly much better than doing none at all. Fortunately, there are good resources available—written for the non-statistician—that you can use to learn how to conduct simple evaluations and analyze data. The choice and implementation of the best methods is beyond the scope of this workbook. For more information, see the references listed in Appendix C and Appendix D. This section will give you an overview of evaluation methods, to acquaint you with some of the basics.

Some common evaluation methods are:

- Interviews
- Questionnaires/surveys
- Visitor/participant observations
- Focus groups

There are many more, and many variations of the four listed here.

Evaluation data falls into two categories: **qualitative** and **quantitative**. Qualitative data looks at limited individual responses in detail; quantitative data is mathematically analyzed to find the patterns in a much larger set of responses. Qualitative data helps to define issues and analyze complex situations, but cannot be generalized to your entire intended audience. Quantitative data can (if properly collected and analyzed) be generalized to the larger population, but to gather reliable data you have to know what questions you want answered, ask them in the right way, and ask a large group of people that statistically represents your desired audience. When quantitative and qualitative data are used together, their strengths combine to give a better result. Qualitative data can indicate what questions are important to address in a quantitative study.

For example—a focus group may provide ideas about what they would like to experience in a new visitor center by answering open-ended questions on the subjects they'd like to see covered and the media they would enjoy. This is qualitative data. Using this data, you could develop a list of potential interpretive topics and techniques. This could be followed by a survey in which a large group of respondents rate their interest in each list item from 1 to 5. This would be a quantitative study. The data can be analyzed mathematically to show which topics and techniques the target audience wants in the visitor center.

Some less-formal methods can be used as part of evaluation, especially as qualitative data for summative evaluation. Consider:

- Comment forms
- Comment book/visitor register
- Letters
- Personal contacts
- Suggestion boxes

Remember that qualitative data can provide clues on whether a project or program is successful, and point the way to further study, but cannot be generalized to a larger population. And in these cases you will not be polling a random sample of everybody who experiences your interpretive services; you are only getting the people who have the time and inclination to give feedback. This self-selected population also tends to be the extremes—the people who really like or really hate it, leaving a large audience in the middle unstudied.

Who is the Evaluator?

The evaluator designs the details of the evaluation, supervises the data gathering, analyzes the data and writes the final report. This individual can be a hired professional evaluator or university professor, or an in-house person with evaluation skills. You may

include park stakeholders and staff members in the design process, especially to provide input on what objectives to measure for and the intended purpose of the evaluation results. To avoid bias, it is best if the main evaluator is a neutral party outside of the interpretive services design team.

The Evaluation Plan

The evaluation plan is an important element of the project/program plan. Evaluation that has been well thought out in advance is more likely to be completed, and more likely to provide useful data. The first thing to consider is why you will be performing evaluations (e.g. evaluating effectiveness, satisfying funding requirements). Then decide what types and methods of evaluation will meet your needs. Ideally, you will use all the evaluation types: front-end, at least one formative evaluation, and summative. If you have to limit evaluation due to time and resource constraints, decide what type of evaluation will give you the most impact.

For each evaluation type you use, include the following in your evaluation plan:

- What goals and objectives will be used to judge success (chosen from previously defined goals and objectives)
- Who will be the evaluator (e.g. hired professional, staff member)
- What evaluation method(s) will be used
- When the evaluation will be done
- What type of report will be produced from the results
- How the results will be used (e.g. to solicit funding, satisfy funders' reporting requirements, improve results, publicize the project/program, inform supervisors)

As with all planning, the final evaluation process may not proceed exactly as planned, but having a plan provides a target to work toward. Feel free to change the plan if circumstances or evaluation goals change. It is most important that you plan to evaluate at times that will provide useful data, that you will perform the evaluations, and put the data to good use (either improving the outcome or providing project/program accountability). An evaluation report that is stuck in a drawer with no action taken is a waste of time, money, and other valuable resources. An evaluation report put to use will be well worth everything put into it.

Integrating Evaluation Results

No matter why the evaluation is originally planned or when it is done, use the results as much as possible to improve the project or program.

Front-end evaluation helps you eliminate errors before they occur, in areas such as the target audience's grasp of key concepts, vocabulary level and level of interest in different aspects of a topic.

After **formative evaluation,** consider changing any exhibit or program elements that confuse or don't interest evaluation participants, have readability issues or are not universally accessible. If key goals and objectives were not met, redesign and, if possible, retest with another formative evaluation.

The interpretive project grand opening or the start of regular program presentation should not be the end of evaluation and improvement of the design. Through the **summative evaluation** process, you can find out where you are meeting your goals and objectives and what is not as successful. Use this information to improve your project or program, if possible, and document and share results for future project and program planning—at your park and at others. If the project or program can benefit from periodic evaluation, continue to evaluate and improve regularly. Your efforts will be rewarded with a target audience more deeply connected to their California State Parks resources.

How Much Will Evaluation Cost?

According to *Designing Education Projects,* "it is typically recommended that 5-15% of project costs be set aside for evaluation." (Day-Miller and Easton 2009) This gives you a ballpark idea of what to expect, but costs will vary quite a bit depending on the type of evaluation and the size of the study you need, among other factors. You can lower the costs if you are able to do some of the evaluation work in-house, or will be using a university and student interns. Because planning and carrying out effective evaluation involves knowledge of social science statistics and survey design, an outside expert will pay off in good, usable results.

1.9 PRODUCING THE PLAN

Writing the Draft

After completion of the research phase and upon receiving stakeholder input, writing of the plan can begin. It may be helpful to review one or more similar plans to see how other parks have assembled their documents (e.g. writing style, level of detail, use of graphics, captions). Other plans can be found on the UDF, Department Archives, Central Records, in your district's library, or in the libraries of the Service Centers or the Interpretation and Education Division.

Use the appropriate plan template provided in this Workbook to guide you in the writing process. Each template is a suggested method of identifying, analyzing and organizing the information necessary for that specific type of interpretive plan. Some template elements may not be necessary or appropriate for the scope of the project you are planning.

When writing the interpretive plan use clear and concise language. Avoid use of scientific jargon and technical writing as much as possible. Be consistent in your writing style and formatting. From the beginning, establish and maintain a formal layout and styles for the plan. This will make it easier to change formatting and layout later if desired.

Use standard bibliography methods such as Chicago or MLA (Modern Language Association) style to reference related published documents that were used in this planning effort and could be located elsewhere (such as CEQA comments, resource inventories, research papers and other studies).

Provide citations for direct quotes, statistical information, and information that could be considered controversial or questionable by others. The Chicago author-date system is simple and less overwhelming to the reader than a plethora of footnotes or endnotes. It is a good option for most interpretive plans, but the choice of citation style is yours. Again, be consistent throughout the plan, and match the bibliography or selected references list style to the style of

PRELIMINARY DRAFT LAYOUT

Save complex final layout for the final draft of the plan. Review of preliminary drafts will trigger multiple changes that could cause you to have to re-lay-out the entire document. Since placement of illustrations and text boxes in Microsoft Word can be frustrating and labor-intensive, we suggest that you keep photos, charts and other illustrations to a minimum in preliminary drafts. Alternately, you can number illustrations in a separate document and then refer to the appropriate illustration in the main document text.

citations—for example, don't use Chicago-style citations and then provide an MLA-style Selected References list.

Throughout the writing process, share your progress with others, including interpretive planning team members and other interpreters not involved with your plan. Remember that the effort you are making to create this document will help provide a significant reference for your fellow interpreters and park supporters, including volunteers, staff (e.g. rangers, maintenance workers, seasonal park aides), management and potential funders.

Reviewing

The Department requires adequate review of all interpretive plans. Review should occur on multiple levels throughout the planning process. Be sure to establish time frames for the review period.

Planning Team Review

Once the interpretive plan has been drafted, allow your entire planning team and designated district staff the opportunity to review the plan. Allow adequate time for proper review. Group consensus will strengthen the support for the final plan and its implementation.

The planning team review should evaluate whether the plan:

- Meets the interpretive goals and objectives
- Attracts visitors
- Provides good access
- Addresses the interpretive themes
- Minimizes impacts on the park's resources

Peer Review

Use the list of interested constituents and stakeholders identified during the initial planning stages to solicit input. Staff from other districts with similar resources and/or projects can also provide valuable input. Interpretation and Education Division staff is available to review interpretive planning documents as well throughout the planning process.

Arrange informal meetings with these individuals to discuss the plan and their comments. Different viewpoints will be helpful in assessing the overall project and eliminating potential problems.

Accessibility Review

The Accessibility Section is responsible for ensuring compliance with all accessibility mandates by reviewing all projects. They should be involved in the planning stages of projects that will affect accessibility to ensure that access needs are sufficiently addressed and met. Review by Accessibility Section staff should begin when Project Evaluation Forms (PEF) and Concept Papers are initially drafted. By involving Accessibility Section staff early in the review process, you can avoid repetitive reviews and ensure that you are adequately addressing legally mandated access compliance issues. Contact the Accessibility Section by calling the Accessibility Hotline at (916) 445-8949, or email at access@parks.ca.gov.

Finalizing the Content and Layout

Make the plan attractive and easy to follow with appropriate headings, sidebars and—in the final plan—images/graphics, but don't sacrifice readability for clever design.

Completing Plan Contents

The following are common elements in interpretive plans that should be written after the rest of the plan is completed:

Executive Summary
The executive summary is an overview of the plan contents should be no more than two pages and should contain enough detail that if it were the only section read it would give the reader a good general idea of what the plan contains, including key recommendations.

Acknowledgements
The acknowledgements section should identify and thank key participants involved in the planning process, recognize those involved with the funding and/or management of the planning project, and acknowledge past, present and future park supporters. List the name and current State Park position or other affiliation of each person being acknowledged. Acknowledgements can appear inside the front or back cover, or on a separate page before the table of contents.

Table of Contents
The table of contents should include at least the main sections identified in the appropriate plan template. Including the headings within each section is optional, but is recommended for maximizing the ease with which readers can find what they are looking for.

Cover and Title Page
Include the name of the park(s) the plan is for, the type of plan and the California State Parks logo on both cover and title page. On the title page, also include "Published by

California State Parks," followed by your district name, city and state, and finally the month and year of publication. See the title page of this workbook for an example.

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The copyright page is the back side of the title page. Place the following information on this page (filling in applicable information as indicated in angle brackets):

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Include signature and date lines for the appropriate plan approvers on the final draft. These may be either on the title page or the copyright page, or they may be on a separate page at the beginning of the plan.

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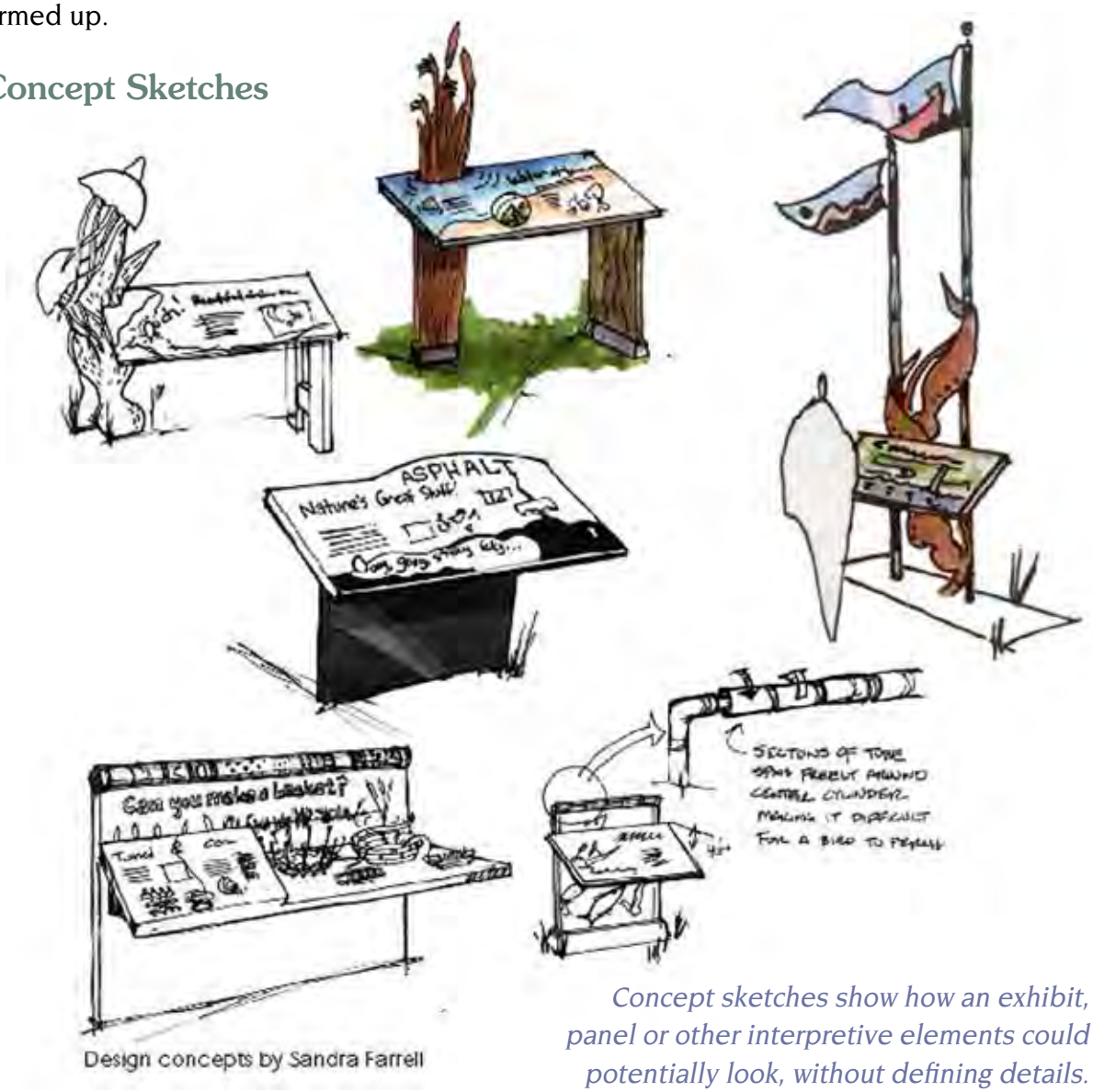
If using photographs, drawings or other graphics, be sure to properly credit the source. Credits can be by the graphics or on a separate credits page at the front or back of the plan. If the credits list is not too long, it may fit on the copyright page (see above).

If you are using an image not owned by the Department, it is important to follow the procedures for requesting permission from the copyright owner to use the image. Also, if you are using a photograph with recognizable people, be sure a DPR993: Visual Media Consent form is on file. For more information regarding copyrights and intellectual property consult the Creations of the Mind: California State Parks Intellectual Property Handbook and DOM section 0906.

Concept Sketches and Bubble Diagrams

Interpretive plans often contain graphics that indicate ideas and intent without defining the specifics of interpretive elements. **Concept sketches** are sketches of ideas of how an interpretive element, such as an exhibit in a visitor center, wayside panel, or object for use in an interpretive program, could potentially look, without defining details. **Bubble diagrams** indicate different interpretive areas and visitor flow between them. Develop final concept sketches and bubble diagrams later in the planning process, when ideas are firmed up.

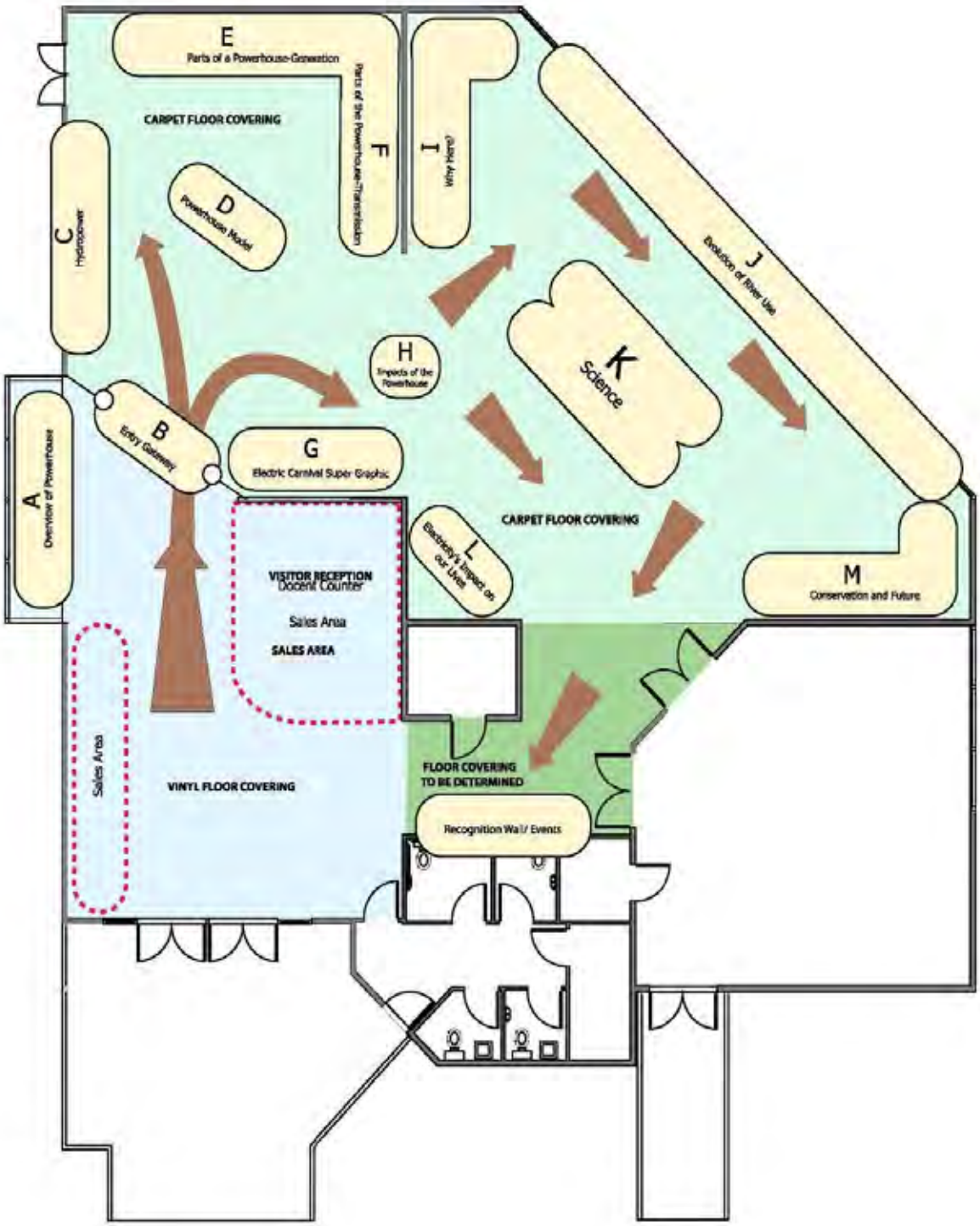
Concept Sketches



Design concepts by Sandra Farrell

Concept sketches show how an exhibit, panel or other interpretive elements could potentially look, without defining details.

Bubble Diagram with Visitor Flow
Folsom Powerhouse SHP



Bubble diagrams indicate different interpretive areas and visitor flow between them.

Final Layout

The document designer should aim for clarity and consistency in the final layout. Emphasize making the plan readable and easy to follow, while also attractive. Suitable headings, sidebars and images/graphics will enhance readability, not detract from it.

Ideally, for your final layout you will have the assistance of a trained graphic designer who can produce an appealing, easy-to-read plan using a professional program such as Adobe InDesign. If this is not possible, concentrate on keeping the document clear and readable over making it fancy. You can create an attractive useable plan using Microsoft Word, though placement of graphics and sidebars will be more difficult and less precise than in a dedicated document layout program.

REMEMBER: THE PLAN DOCUMENT MUST BE ACCESSIBLE

Like any California State Parks publication, internal or external, the final plan document must adhere to accessibility guidelines for publications. Refer to the most recent editions of the State Parks publications *All Visitors Welcome* and *Accessibility Guidelines* for the publication guidelines.

When deciding on a final layout, consider how handy the plan will be for the user. For example, if the plan is laid out in a horizontal format, it may be awkward to keep on a regular bookshelf and therefore not as likely to be used. Too much white space may make the final document too bulky; but some white space is necessary in a good layout, and is handy for making comments and notes.

Avoid using fill-justification, where text is adjusted with extra spaces to make both left and right margins even. Left-justified body text is the easiest to read, and is what is recommended in the *California State Parks Accessibility Guidelines.* You may use one or two columns, as you prefer. Three-column designs are awkward when text is large enough to meet State Parks accessibility guidelines.

Final Review and Approval

Departmental policy requires adequate review and approval of all plans developed for park units. This remains true whether the plan is developed by departmental staff or an outside contractor. The level of review and the approval process will depend on the type of interpretive plan developed and the review process outlined by the District Superintendent.

Final Review and Approval of Interpretation Management Plans

According to Department policy, District Superintendents will develop a process for district-level review and approval of all management plans, including Interpretation Master Plans, Interpretation Action Plans and Interpretive Prospectuses. This review will involve all necessary internal and external entities. State Parks policy also requires further management plan review and approval at the headquarters level. For more detailed information on the review of management plans, see DOM 0500 Park Planning.

Final Review of Interpretive Services Plans

Similar to management plans, District Superintendents are responsible for developing a process for district-level review and approval of all interpretive services plans. When requesting review by all applicable internal and external entities, utilize the capabilities of organizations and individuals with expertise in the subject area(s) or type of project or program addressed in a particular plan.

Archiving and Making Public

Copies of all final interpretation planning documents should be kept at the district and filed in the UDF. The district is required to file an electronic and printed copy with the Interpretation and Education Division, Department Archives and Central Records Office.

Interpretation Management Plans should be readily available for the public. Post the completed approved master plan, action plan or prospectus on the park web page, and let park supporters and stakeholders who were involved in the planning know it is there. Provide printed copies to the most involved stakeholders. Consider also making the plan available at local libraries and community centers.

CHAPTER TWO:

INTERPRETATION MASTER PLAN, ACTION PLAN AND INTERPRETIVE PROSPECTUS

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CHAPTER TWO:

INTERPRETATION MASTER PLAN, ACTION PLAN AND INTERPRETIVE PROSPECTUS

Planning for your park's interpretation is an exciting opportunity that brings together park staff representing diverse disciplines with members of your community and other stakeholders. An Interpretation Master Plan will not only document the array of programming that is currently offered, but will carefully analyze how it meets visitor needs and promotes understanding of your park's significant resources. Because time, money and staff are limited at every park, having an Interpretation Master Plan is particularly important because it provides a set of recommendations that are clear and realistic.

Interpretation Master Plans define the objectives, methodologies and concepts for how goals and guidelines identified in a park's General Plan will be achieved. The development process for Interpretation Master Plans must be inclusive and involve all possible stakeholders (internal and external), not just those involved in park interpretation.

The **Interpretation Master Plan** builds from the goals and guidelines identified in the General Plan by developing measurable objectives and strategies. The **Interpretation Action Plan** builds from the Interpretation Master Plan by identifying specific tasks needed to implement the strategies and establishing priorities for each task.

Each of these plans can be a separate, stand-alone document. However, the Interpretation Action Plan is usually developed immediately following the Interpretation Master Plan as part of the same planning effort. Completing the Interpretation Action Plan soon after the Interpretation Master Plan will strengthen the efforts made by your planning team and stakeholders because it allows you to begin implementing specific tasks and priorities.

An **Interpretive Prospectus** is a provisional document developed to guide park interpretation in lieu of an approved General Plan. It contains the same information as the Interpretation Master Plan up through the sections which lay out goals and objectives for park interpretation. It is acceptable to develop a complete Interpretation Master Plan even if the park has no General Plan. The Interpretive Prospectus is intended to save time over completing a full Master Plan while still establishing well-researched themes, interpretive periods, and other basic guidance for interpretation.

For an Interpretive Prospectus, follow the directions and content for an Interpretation Master Plan, but do not develop strategies or phasing. All other parts of the process and content will be the same.

All Interpretation Master Plans, Interpretation Action Plans, and Interpretive Prospectuses produced for units of the California State Parks System must be reviewed and approved according to Department policy related to Review of Management Plans (see DOM chapter 0500, Park Planning.).

2.1 THE INTERPRETATION MASTER PLAN

Developed through the collaboration of California State Parks staff, management, resource specialists and other stakeholders (internal and external) such as cooperating associations and members of the community, the Interpretation Master Plan serves as a long-range blueprint for interpretation and education within a park unit (or collection of units). The plan will continue to be revised and revisited on a regular basis, responding to changes that impact interpretation and education within the park (e.g. new addition to park, new General Plan).

Research for an Interpretation Master Plan

For parks with General Plans approved after April 2010, many sections of the Interpretation Master Plan will be directly quoted or summarized from this source if sufficient information was gathered and documented during the general planning process. For those parks with General Plans approved prior to April 2010, some of the Interpretation Master Plan sections will have to be developed or rewritten to current standards.

Information regarding the research phase of interpretive planning is included in Chapter 1 "Success Starts Here." It includes helpful details regarding data sources and the research process.

More detailed information on data collection and analysis is included in the "Writing an Interpretation Master Plan" section below. Additionally, a checklist of "Existing Interpretation and Education" with other source tips is included in Appendix E.

Projected Timeline and Key Milestones

The amount of time needed to complete an Interpretation Master Plan will vary from park to park, depending on a variety of factors, such as availability of a current General Plan and/or related planning data, team members representing diverse resource disciplines, current and anticipated visitor needs, and other stakeholder input. It is not unusual for the planning process to take 12 to 18 months. The following timeline and milestones can be adjusted to meet your park's circumstances. You may also consider including the Interpretation Action Plan within this timeline if your team decides to develop it immediately after completing the Interpretation Master Plan

Month 1: Assemble the Team

- Identify specific roles/tasks for each team member
- Review IMP outline, projected timeline and key milestones
- Clarify the purpose of your plan and why it is being written now

Months 2 & 3: Research and Documentation by Team Members

- Locate and review existing data and documents
- Assemble existing data for the Planning Foundation
- Identify any items that cannot be located and prepare a strategy to complete

Months 4 & 5: Stakeholder Input

- Identify current and potential audiences, stakeholders, and partners (e.g. individuals, groups, organizations)
- Determine appropriate method for gathering stakeholder input (e.g. meetings, focus groups, surveys)
- Prepare information for presentation at stakeholder meeting(s) (e.g. PowerPoint, table top displays, tour of the park)
- Gather stakeholder input on the park's existing interpretation, such as needs and special concerns, and the overall vision for park interpretation

Months 6 & 7: Assemble the Planning Foundation & Recommendations

- If not yet developed, complete Interpretive Direction (e.g. Goals, Themes)
- Team members develop Objectives, Strategies & Suggested Phasing

Months 8 & 9: Stakeholder input on Objectives, Strategies & Suggested Phasing

Months 10 & 11: Write the Interpretation Master Plan

- Complete IMP first draft; send for review (peers, management)
- Complete second draft if necessary and send for additional review

Month 12: Final IMP Approval and Distribution

- Make any final adjustments to complete the IMP
- Circulate IMP for final review and approval sign-off
- Prepare copies and distribute to stakeholders
- Place paper and/or electronic files, data, etc., in park Unit Data File (UDF)
- Provide electronic copy of plan to Interpretation and Education Division, and post on park web page for public access

The Contents of an Interpretation Master Plan

The information included in an Interpretation Master Plan and its level of detail will vary from plan to plan, depending on the park's interpretation and education program and resources. At a minimum, the Interpretation Master Plan must contain the following:

Interpretation Master Plan Template

Executive Summary

Acknowledgements

Chapter 1: Introduction

1.1 Park Overview

1.2 Plan Purpose

1.3 Planning Process

1.4 Park Planning History

Chapter 2: Planning Foundation

2.1 Park Resources

2.2 Existing Interpretation

2.3 Local & Regional Influences

2.4 Visitation & Visitor Use

Chapter 3: Summary of Analysis

Chapter 4: Interpretive Direction

4.1 Mission, Purpose and Vision Statements

4.2 Interpretive Goals and Guidelines

4.3 Interpretive Themes and Period(s)

4.4 Educational Frameworks & Standards

Chapter 5: Recommendations

5.1 Goals, Objectives, Strategies

5.2 Suggested Phasing

References

Appendix

2.2 SUGGESTED STEPS TO WRITING AN INTERPRETATION MASTER PLAN

Begin writing your Interpretation Master Plan with the Planning Foundation, followed by the Recommendations. Keep your References and Appendices sections current throughout the writing process. The last step is to complete the Executive Summary, Acknowledgements and Introduction.

Writing an Interpretation Master Plan

After completion of the research phase and upon receiving stakeholder input, writing of the Interpretation Master Plan can begin. It may be helpful to review one or more Interpretation Master Plans to see how other parks have assembled their documents (e.g. writing style, level of detail, use of graphics, captions). Other park Interpretation Master Plans can be found on the UDF or in District, Interpretation and Education Division, and Service Center libraries.

The following is a suggested method of identifying, analyzing and organizing the information necessary for the plan. Share your progress with others, such as interpretive planning team members and other interpreters not involved with your plan. Remember that the effort you are making to create this document will help provide a significant reference for your fellow interpreters and park supporters, including volunteers, staff (e.g. rangers, maintenance workers, seasonal park aides), management and potential funders.

Executive Summary

The executive summary should be written after the rest of the plan is completed. It should be no more than two pages and should contain enough detail that if it were the only section read it would give the reader a good general idea of what the plan contains, including key objectives and strategies.

Acknowledgements

The acknowledgements section should be written after the rest of the plan is completed. It should identify and thank key participants involved in the planning process, recognize those involved with the funding and/or management of the planning project, and acknowledge past, present and future park supporters.

Table of Contents

The table of contents should include at least the main sections identified in the Interpretation Master Plan template. Including the headings within each section is optional, but is recommended for maximizing the ease with which readers can find what they are looking for.

Chapter 1: Introduction

Use the material gathered from the relevant sections in *Chapter One: Success Starts Here* to write the Introduction:

- Existing planning documents (page 215; Planning Documents checklist)
- Assembling a Planning Team (page 213; Assembling a Team checklist)
- Involving Stakeholders (page 230; Public Involvement checklist)

1.1 Park Overview

- Briefly describe the park for those who are not familiar with it.
  - State park location (e.g. in the Sierra Nevada, 30 minutes outside Tahoe City)
  - Identify park features that represent or contribute to the park's character and physical setting (e.g. unusual sandstone formations and Depression-era architecture).
  - Include a map that shows the park's location in the general region and relative to nearby cities, other recreation sites and interpretive providers.
  - Include more specific site location map(s) showing key park features.
- Provide a summary of the park's history.
  - Explain when and how was it acquired and classified.
  - Describe any additions or other notable changes made since the park was first acquired, if any.
- Describe the park's character and sense of place (or spirit of place).
  - What makes this a place of inspiration, recreation and renewal?
  - What are the inherent forces and connections that attract those who visit this park?
  - Refer to your park's Sense of Place (or Spirit of Place) if included in the General Plan. Include it, or excerpts from it, here as appropriate.

SENSE OF PLACE (or Spirit of Place) is often used to describe either the intrinsic character of a place, or the meaning people give to it. Often a sense of place incorporates both these elements. Some General Plans (especially those completed after 2000) have included a Sense of Place (or Spirit of Place) in the introductory chapter.

1.2 Plan Purpose

- Identify the purpose of this plan—what will it achieve.

- Restate the purpose of an interpretation master plan—it is a long-range interpretive plan that builds on the general plan and provides a unified interpretive vision for the park.
- Include any specific purposes for this particular plan.
- Identify the intended lifespan of the plan (e.g., how long it will be used and/or when it should be updated).

- State why it is being written now. (e.g. Is there a newly approved general plan to build on? Have there been significant changes in park use patterns or resources? Does the park or region need a more coordinated interpretive approach? Is it needed to attract funding?)

1.3 Planning Process

- Briefly describe the process used.
  - List the planning team members and their roles.
  - Identify when planning started and finished.
  - Summarize the process of public involvement (e.g. stakeholder meetings, surveys, interviews)
  - Provide results from any surveys conducted during the planning process and a summary of stakeholder meetings in the appendix.

1.4 Park Planning History

- List and briefly describe existing planning documents that drive or guide interpretation, such as park general plans, interpretive prospectuses, interpretive project or program plans, and furnishing plans (include the title and date of each).

What makes this park a place of inspiration, recreation and renewal?

Chapter 2: Planning Foundation

Use the material gathered from the relevant sections in *Chapter One: Success Starts Here* to write the Planning Foundation:

- Gathering, Organizing and Analyzing Documents, Data and References (page 16)
- Identifying Significant Resources (page 18)

- Existing Interpretation Special Concerns (page 23)
- Local/Regional Resources (page 21)
- Identifying Your Audience (page 22)

2.1 Park Resources

2.1.1 Interpretive Significance

- If the park's General Plan has a statement of Interpretive Significance, restate it. Cite any changes from the General Plan. If the General Plan does not have a statement of Interpretive Significance, draft one based on the questions following:
  - › Which resources are important or interesting to park visitors? And why?
  - › Which resources are unique, representative or significant to the park?
  - › Are there any resources within the park that require special protection and/or would benefit from greater public awareness?

An Interpretive Significance statement summarizes the park's significant natural, cultural and recreational resources that are important topics for interpretation.

2.1.2 Natural Resources

- Identify the park's representative and/or unique plants, animals and geological features.
- Explain how these resources changed throughout time.
- Identify any local, state and/or national designations (e.g. a national natural landmark). Include when and why these resources were designated.

Be sure to consult with appropriate subject matter specialists in order to incorporate the most recent understanding of the resources at hand.

2.1.3 Cultural Resources

- Identify the human stories that are representative of and/or unique to your park.
- Briefly describe the resources in the park that represent these stories. (This includes archaeology and museum collections.)
- Identify any local, state and/or national designations for these resources (e.g. the National Register of Historic Places). Include when and why they were designated.

2.1.4 Recreational Resources

- Identify the recreational resources that are representative of and/or unique to the park.

- Describe how these resources have changed throughout time.
- Identify why people come and recreate at your park, and what activities they engage in most often.
- Discuss whether any of these recreational activities provide opportunities for interpretation and education.

Discuss whether any recreational activities provide opportunities for interpretation and education.

2.2 Existing Interpretation

This sub-section documents the current status of park interpretation and identifies related needs to help justify many of the plan's recommendations. Use the following outline and related questions/prompts to organize your park's Existing Interpretation:

2.2.1 Interpretive Services: Non-Personal (Facilities & Media)

Current Status:

- Identify and briefly describe any existing interpretive facilities, such as visitor center, campfire center, interpretive trails, house museums, native plant demonstration garden, etc.
- If any of the facilities have other, non-interpretive uses, also note those (e.g. building or grounds rental for special events such as weddings or meetings).
- Identify and briefly describe indoor and outdoor panels and exhibits (including house museum furnishing), audiovisual presentations, publications and/or websites.

Analysis:

- Describe any Special Concerns.
- Identify gaps in existing non-personal interpretive services

2.2.2 Interpretive Services: Personal (Programs & Events)

Current Status:

- List and briefly describe existing presented interpretive programs, including school programs (onsite, offsite, PORTS, ELP and ESP), public tours,

When assessing your program needs, consider the Special Concerns listed below and include appropriate information in the Analysis discussion for each of the Existing Interpretation categories that follows:

- **Barriers (e.g. physical, language, economic, accessibility)**
- **Revenue**
- **Public Safety**
- **Park Security**
- **Environmental Factors**
- **Maintenance**
- **Use of Facilities and Equipment**

demonstrations, campfire programs, Junior Rangers, living history, talks, roving interpretation and other in-person interpretation. (See Glossary for definitions of program types.)

- List and briefly describe regularly occurring interpretive special events. Who organizes the event (e.g. park staff and volunteers, concession, cooperating association)?

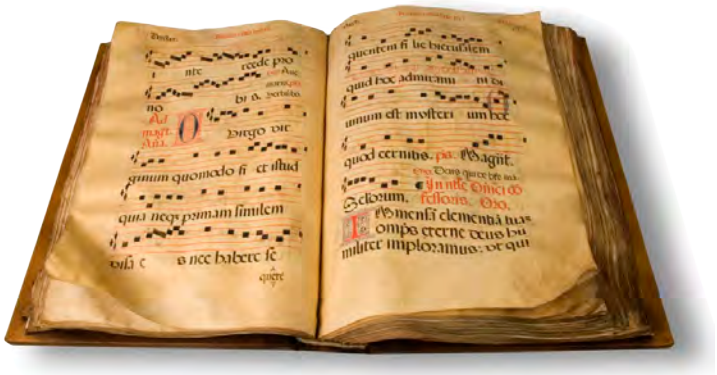
Analysis:

- Describe any Special Concerns.
- Identify gaps in existing personal interpretive services

2.2.3 Collections

Current Status:

- Provide a brief summary of the park unit's Scope of Collections Statement (restate from the General Plan or revise using the most current version of the *Guidelines for Writing a Scope of Collections Statement*).



Museum collections are objects maintained for use in exhibits, research and publications. These can include archaeological, paleontological, and natural history specimens, historic firearms and other historic objects.

- Identify the types of park collections currently used for interpretation.
- Briefly describe types of objects not currently used but available for interpretation.
- Include the full Scope of Collections Statement in the appendix.

Analysis:

- Describe any Special Concerns.
- Identify gaps in existing collections (refer to the Scope of Collections Statement).

Interpretive collections are objects from park collections, including hands-on replicas, used for interpretive purposes

2.2.4 Educational Services

Current Status:

- Identify the educational community that utilizes your park.
  - How many school groups come?
  - Where do they come from?
  - What are their age groups and educational focus?
- Describe how the educational community benefits or contributes to the park's interpretive and educational programs.
- Identify universities doing research within your park.
  - Can this research be interpreted to the public?
- Identify nearby schools that are potential partners, but not currently active at the park.

Analysis:

- Describe any Special Concerns.
- Gaps will be addressed in Section D: Visitation and Visitor Use.

2.2.5 Interpretive Concessions

Current Status:

- Identify interpretive concessions and the services they provide.

Analysis:

- Describe any Special Concerns.

2.2.6 Interpretive Readiness

Current Status:

- Describe the staffing (paid and volunteer) involved in interpretation. (See the Staffing Considerations checklist on page 229 for a list of positions to consider.)
  - How many park employees are involved in interpretation? What are their classifications and time bases? How are they trained and evaluated?
  - How many docents and other volunteers assist with interpretation? What tasks do they perform? Who manages them? How are they trained and evaluated?

- Describe the operational support given to interpretation at your park, such as funding, office space, internet access, research library, storage areas and interpretive materials/supplies.

Analysis:

- Describe any Special Concerns.

2.2.7 Marketing

Current Status:

- Briefly describe how programs are publicized outside the park (e.g. television, radio, newspapers, website, word-of-mouth, road signs).
- Briefly describe how the park advertises interpretive and educational opportunities within the park (e.g. bulletin boards, newsletters).

Analysis:

- Is the marketing effectively reaching the visitors? (Note: this would be best answered with information from a visitor survey)
- Describe any Special Concerns.

2.2.8 Partnerships & Support

Current Status:

- Identify any partnerships with other interpretation providers, schools, community groups.
- Does your park have a cooperating association? If so, what is its mission and how does it support your park (especially interpretation and education)?
- Identify other stakeholders that you currently work with (such as conservation organizations, cultural groups or others with an interest in the park). How and why do they support the park's interpretation and education?
- Identify other organized groups or individuals that provide significant funds, time, publicity, lobbying or other forms of support.
- Identify what types of interpretive services (events, programs, facilities and media) are of interest to these partners and supporters.

Analysis:

- Is there untapped potential for further or expanded partnerships?
- Is there potential for donors or sponsors to contribute to park interpretation? (See page 6 in *Chapter One: Success Starts Here* for more on donor and sponsor recognition.)
- Describe any Special Concerns.

2.2.9 Research Resources

Current Status:

- Identify park-specific materials that are available for cultural, natural and recreational background research when planning park interpretive programs and facilities (e.g. park archives, resource inventories, academic research).
- Identify any local, regional and/or statewide repositories that hold further information or collections associated with the park.

Analysis:

- Describe any Special Concerns
- Describe any obvious gaps and needs for future resource.

2.3 Local and Regional Influences

2.3.1 Community Involvement

- Discuss the relationship of the local community to your park.
  - › Do people in the local community know about and use the park?
  - › How do people within the local community know about your park?
  - › Is the community supportive of your park?
  - › Are there community events or other programs that take place in your park?
  - › How is the community currently involved in your interpretive and educational programming and facility development?

2.3.2 Other Interpretation Providers

- Identify and briefly describe other interpretation providers in the area (within a 1 to 1 ½ hour drive), e.g. other parks, museums, discovery centers.
  - › What are their main topics and methods?
  - › What audience do they serve?
  - › Do any of these facilities impact or have the potential to impact interpretation within the park?
  - › Is there any collaboration between local interpretation providers and the park?

Analysis

- Describe how an experience at your park differs from, duplicates or complements the surrounding facilities.
  - › Is there potential for partnerships with these entities?
  - › What types of interpretive services (events, programs, facilities and media) are of interest to potential partners?
  - › Do any of these facilities serve audiences that are target groups for your park?

2.4 Visitation & Visitor Use

2.4.1 Visitor Synopsis

- Identify who comes to your park. Be as specific as possible. Consider:
  - › User groups such as birders, campers, cyclists, etc.
  - › Social groups such as families, tour groups, church groups, etc.
  - › Demographics such as age, gender, language, etc.
  - › Where they are from (e.g. local, nearest large city, international, etc.).
- Identify why they come to your park.
- Provide a summary of average annual attendance to presented- and non-presented interpretive programs. [Include relevant interpretive data from the Computerized Asset Management Program (CAMP) system in the Appendix.]

Analysis

- Identify the factors in your region (e.g. demographics, location) that will affect your park's potential audience.
- Ascertain which groups are underrepresented among park visitors and should be identified as potential and target audiences.

2.4.2 Visitor Access, Orientation, & Circulation

- Describe how visitors find out about the park. (e.g. website, word of mouth, road signs)
- Describe how visitors access your park.
  - › Is your park easily accessible from major roads/highways/ freeways?
  - › What forms of transportation

How and where do visitors access the park?

do people use? (e.g. public transportation, personal vehicles, private tour buses)

  - Where do visitors enter into and depart from your park?
  - Is signage to the park clear and understandable?
- Identify where welcome/orientation information are located in the park.
- Identify how visitors circulate within the park.
  - What are the travel routes within the park (e.g. roads, trails, transportation systems)?
  - What resources are available to help visitors navigate the park (e.g. maps, signage)?

Analysis

- What are the challenges of visitor access to, and orientation and circulation within, the park (e.g. poor signage, traffic)?

2.4.3 Visitor Expectations & Experience

- Explain what visitors want and expect from their experience in the park.

Analysis

- Analyze whether the current interpretation helps to meet visitors' expectations.
- Describe what could be done differently to help visitors experience a deeper understanding of the park and its resources.

Chapter 3: Summary of Analysis

Based on the information gathered and analyzed in the previous section, identify the key challenges and solutions. Consider the Special Concerns and other key points raised in your analysis of Existing Interpretation, Local and Regional Influences, and Visitation & Visitor Use.

The Summary of Analysis is a critical component of the Interpretation Master Plan, providing the key challenges and solutions that will be the basis for specific recommendations.

The Summary of Analysis may be created in a narrative form or as a list, depending on the nature of the park unit and its needs. This summary will be used by your planning team to formulate measurable objectives and related strategies in the Recommendations section.

Chapter 4: Interpretive Direction

Use the material gathered from the relevant sections in *Chapter One: Success Starts Here* to write the Interpretive Direction:

- Developing Interpretive Goals and Objectives (page 35)
- Identifying Interpretive Period(s) (page 36)
- Articulating Interpretive Themes (page 37)
- Identifying Educational Content Standards (page 25)
- Aligning school programs with the Education and Environment Initiative (page 27)

4.1 Mission, Purpose and Vision Statements

- Quote the California State Parks mission statement.
- Quote the California State Parks mission statements for interpretation and education.
- Quote the most recent Declaration of Purpose (sometimes named the Statement of Purpose) from the park's General Plan. (Leave blank if not identified in the GP)
- Quote or define the park unit's mission for interpretation. (Restate from the General Plan, or work with planning team and stakeholders to create new, if not in the GP)
- Quote or define the park unit's vision for interpretation. (Restate from the General Plan, or work with planning team and stakeholders to create new, if not in the GP)

4.2 Interpretive Goals and Guidelines

- State the interpretive goals for the park unit. (Restate from the General Plan, or create new if no interpretive goals in the GP)
- If applicable, restate the interpretive guidelines from the General Plan

If interpretive guidelines have not been identified in the GP, do not create new ones since these are only developed during a park's general planning phase. They are essentially replaced by more specific measurable objectives in the following section of the Interpretation Master Plan.

4.3 Interpretive Themes and Period(s)

- State the park unit's unifying theme, primary theme(s) and secondary theme(s). (Restate from GP or revise to current standards)
- If applicable, state the park unit's interpretive period(s). (Restate from GP or revise to current standards)
- If applicable, explain changes or additions to themes or interpretive periods from the GP.

Interpretive themes are concise statements that define the informational scope and perspective to be offered. Older planning documents often included interpretive themes that by today's standards are topics. If interpretive themes previously developed for your park do not meet current standards, create new ones that do.

4.4 Educational Frameworks & Standards

- Identify which Content Standards from the California Department of Education's frameworks fit well with the park's significant resources, interpretive periods and themes. Summarize relevant content standards in the main document body, providing the subject area, grade, and topic for each content standard. If desired, include full text of relevant Content Standards from the California Department of Education's frameworks in the appendix. Unless only a very few standards are relevant, including the full content standards in the main document will disrupt the document flow.
- Identify which Environmental Principles and Concepts can be addressed by a park's significant resources, interpretive periods and themes.

Chapter 5: Recommendations

For the purposes of interpretation planning, recommendations are stated in terms of goals, objectives and strategies. Based on the Summary of Analysis, formulate specific measurable objectives and related strategies based on the previously identified goals.

Concept sketches and photos of similar interpretive elements work well as illustrations in the Recommendations section.

This section may be created in a narrative form or as a matrix, depending on the nature of the park unit and its needs. The goals, objectives and strategies should be given a consistent numbering system for ease of later identifying them in the Interpretation Action Plan. Refer to previously-completed Action Plans for examples of goals, objectives and strategies; and related numbering system.

5.1 Goals, Objectives and Strategies

- Restate the interpretive goals for the park unit from the Interpretive Direction section and for each goal answer the following questions:
  - › What are the objectives that will assist in meeting this goal?
  - › What are the strategies (media, facilities, programs; and other actions such as creating

In order to avoid the need for environmental review at this stage of planning and to allow for the Interpretation Master Plan to have a longer lifespan, strategies should be identified in general, not location-specific, terms. The Interpretation Action Plan can then begin to get more specific in terms of identifying the tasks that will be needed to carry out the strategies.

partnerships, conducting further research, collections development and staffing changes) that will assist in meeting this objective? (Note: Some strategies may help meet multiple objectives.)

5.2 Suggested Phasing

- Propose a suggested order/phasing for fulfilling the objectives and strategies identified in this section (e.g., what should be carried out in the next 1-3 years, 4-6 years, 7-9 years).
  - Organize each phase by the strategy categories (media, facilities, programs, and other actions such as collections development and staffing changes) with a parenthetical notation referencing the related goal and objective.

Suggested Phasing is a tool that begins to identify when the various objectives and strategies might be undertaken. A more detailed timeline with specific tasks and priorities is completed in the Interpretation Action Plan.

References

List the references (both internal and external) that were consulted in the development of the plan. Organize the references in a way that will maximize their usefulness to those reading and using the plan in the future. Brief annotations (even if only for those resources you found most useful) are recommended but not required.

Appendix

Include relevant documentation that was gathered or produced during the development of the Interpretation Master Plan. These may include:

- Surveys (taken during the planning process)
- Stakeholder Meetings (include date, time, location, participant names, affiliations and a summary for each meeting)
- Scope of Collections Statement for the park
- Educational Frameworks and Content Standards
- Computerized Asset Management Program (CAMP) Interpretive Activity Data

2.3 THE INTERPRETATION ACTION PLAN

In most cases, the Interpretation Action Plan should be developed immediately following, and as part of the same process as, the Interpretation Master Plan. The Interpretation Action Plan, however, should be its own, stand-alone document. This will allow for the Master Plan to have a longer lifespan, and allow for easier updating of the Action Plan without requiring the reproduction and redistribution of the Master Plan each time the Action Plan is updated.

Stakeholder Involvement During the Interpretation Action Plan Process

The involvement of stakeholders is a critical step in the development of an Interpretation Action Plan. Since the focus of this plan is to identify specific tasks associated with approved strategies, it is essential that those who will be required to assist with task implementation be a part of this process. Stakeholders should also be involved during the process of establishing priorities. Include stakeholders such as target audiences, the local community and others who have a stake in when and how tasks will be implemented.

The Contents of an Interpretation Action Plan

As with an Interpretation Master Plan, the information included in an Interpretation Action Plan and its level of detail will vary from plan to plan, depending on the park's interpretation and education program and resources. At a minimum, the Interpretation Action Plan must contain the following:

Interpretation Action Plan Template

Section 1: Introduction

Plan Purpose

Planning Process

Section 2: Tasks and Priorities

Section 3: Responsibilities for Implementation

Planning Updates

Project Infrastructure Database

Funding

Section 4: Appendices

If the Interpretation Action Plan is developed as part of a combined master plan/action plan effort, the Action Plan may be made the last section before the appendices of a combined document. In this instance you will only have one Executive Summary and set of appendices.

Writing an Interpretation Action Plan

Upon completion of the suggested phasing section of the Interpretation Master Plan, work on the Interpretation Action Plan can begin. It may be helpful to review one or more Interpretation Action Plans for ideas on matrix content and level of detail. Contact the Interpretation and Education Division for examples.

The following is a suggested method of analyzing and organizing the Interpretation Action Plan data. Share your progress with others, such as interpretive planning team members and other interpreters not involved with your plan. Remember that the effort you are making to create this document will help provide a significant reference for your fellow interpreters and park supporters, including volunteers, staff (e.g. rangers, maintenance workers, seasonal park aides), management and potential funders.

Executive Summary

The executive summary should be written after the rest of the plan is completed. It should be no more than two pages and should contain enough detail that if it were the only section read it would give the reader a good general idea of what the plan contains.

Acknowledgements

The acknowledgements should be written after the rest of the plan is completed. It should identify and thank key participants involved in the planning process, recognize those involved with the funding and/or management of the planning project, and acknowledge past, present and future park supporters.

Table of Contents

The table of contents should include at least the main sections identified below. Including the headings within each section is optional, but is recommended for maximizing the ease with which readers can find what they are looking for.

Section 1: Introduction

Plan Purpose

- What is the purpose of this plan—what will it achieve? Include the purpose of an interpretation action plan in general—it is a short-range interpretive plan that builds on the interpretation master plan and provides a coordinated direction for interpretation at the park. Also include any specific purposes for this particular plan. Finally, list the intended lifespan of the plan (i.e., how long it will be used and when it should be updated).
- Why is it being written now (what is driving this planning effort)? For example, is there a new approved general plan to build on? Have there been significant changes in park use patterns or resources? Does the park or region that the plan is being written for need a more coordinated interpretive approach?

Planning Process

- Who was on the planning team, and what were their roles?
- When did planning start and finish?
- Briefly describe the process used.

Section 2: Tasks and Priorities

This section should consist of a matrix that takes the strategies identified in the Master Plan (media, facilities, programs, and other actions such as collections development and staffing changes) and develops tasks based on those strategies. The matrix should also indicate who is responsible for each task, give each task a priority, and generally identify the costs associated with the task (both one-time costs and ongoing costs). Based on the strategies identified for your park, some of the tasks you may wish to consider might include:

- Interpretive Services: Non-Personal (Facilities & Media) (renovating old, developing new; publications, audiovisual programs)
- Interpretive Services: Personal (Programs & Events) (improving authenticity; adding or improving tours, demonstrations, living history, other activities; developing guidelines, theme-related programs, events calendar.)
- Interpretive Collections [policies guiding acquisition and disposition, collections use]
- Educational Services (e.g. teacher training, guides, Environmental Living Programs—ELP, Environmental Studies Programs—ESP, school tours, PORTS)
- Interpretive Concessions (recommendations as appropriate to the park resources)
- Interpretive Readiness (staff, docent and concession training focus, schedule, evaluation; park teams and committees such as district interpretive improvement

team, concession review team; operational support given to interpretation such as funding, office space, internet access, research library, storage areas and interpretive materials/supplies)

- Communication (internal communication, public awareness, outreach, website, orientation signage)
- Partnerships and Support (direction in support of interpretation for cooperating association, foundation, other organizations; opportunities for collaboration)
- Park Research (recommendations for research and references—graphics files, cultural landscape plans, historic structures reports, interpretive plans, property histories)

Section 3: Responsibilities for Implementation

Planning Updates

- Who will be responsible for reviewing and updating the plan on a regular basis? Who should serve on that team?
- Who will be responsible for developing the Annual Interpretation Implementation Plan and at what time of year will that occur? Who should serve on that team?

Project Infrastructure Database

- Who will be responsible for ensuring projects identified in the Action Plan are entered into the Project Infrastructure Database (PID)?

Funding

- Who will be responsible for seeking funding for the high-priority, immediate needs tasks?

Section 4: Appendices

Include relevant documentation that was gathered or produced during the development of the Interpretation Action Plan. These may include:

- Stakeholder Meetings (include date, time, location, participant names, affiliations and a summary for each meeting)
- List of PID entries generated from this Action Plan

CHAPTER THREE:

INTERPRETIVE SERVICES PLANS

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CHAPTER THREE:

INTERPRETIVE SERVICES PLANS

Interpretive services can be divided into projects (non-personal interpretation) and programs (personal interpretation).

Implementing the Tasks identified in your park's Interpretation Action Plan is an exciting time. You are transforming your visions into reality. Many of these tasks will result in new interpretive services. Depending on the complexity of the interpretive services, you may find yourself planning them with staff and community members that you worked with during the IMP's development. Or, you may have an opportunity to engage with new people in the community, contractors or State Parks employees elsewhere in the state.

While ideally the park will have an Interpretation Master Plan and Interpretation Action Plan before interpretive services are planned, sometimes the reality of funding and timing means you must plan a project or program without this firm planning foundation. In that case, you will be building on the general plan, interpretive prospectus, or whatever other previous interpretation planning is available. This chapter will provide guidance at appropriate points on how to partially compensate for the lack of interpretation management plans when planning interpretive services.

Interpretive services can be divided into projects (non-personal interpretation) and programs (personal interpretation). The plans for projects and programs have

many common sections, especially in the background information that drives the final interpretive experience. The planning of the actual interpretive experience differs quite a bit, though, so this chapter has separate sections and outlines for Interpretive Project Plans and Interpretive Program Plans.

REVIEW AND APPROVAL OF INTERPRETIVE SERVICES PLANS: WHEN AND WHO?

District Superintendents are responsible for developing a process for district-level review and approval of all interpretive services plans. (DOM 0902.6.5.1). Besides review as part of the approval process, you will want to seek the input of others outside of the planning team throughout the planning process.

WHO: Take advantage of the experience and knowledge of subject experts, people experienced with media and methods being used, and other interpretive planners by asking them to review plan drafts. Some of these reviewers may give input on the draft several times at different planning stages. Staff at the Service Centers and policy divisions—including the Interpretation and Education Division—can be especially helpful for review. The Interpretation and Education Division is always available to assist with review of interpretive plans.

WHEN: The district superintendent will decide at what stage the final plan review and approval takes place. The best stages for additional reviews will vary between different projects and programs. At a minimum you will want others to review plan sections that will be supplied to a contractor, and before large-scale implementation takes place.

3.1 INTERPRETIVE PROJECT PLAN

Types of projects that you might plan include wayside panels, visitor center exhibits and house museum rooms

Interpretive Projects can range from a couple of wayside panels to an entire, multi-million dollar visitor center. They vary in terms of cost, complexity, and how long they take to complete. Regardless of how costly or inexpensive, complex or simple your project is, EVERY project will benefit from a plan.

Types of projects that you might plan:

- **Wayside panels**
- **Visitor Center**
- **House Museum**
- **Audiovisual program**
- **Interpretive Trail**
- **Interpretive Garden**
- **Smartphone App Adventure Game**

This chapter is designed to guide you through the planning process and to assist you in developing a written plan. Following the process ensures that you cover the various steps necessary to complete a successful project. The written plan provides a record that can be useful in the event of staff changes during the life of the project or as a resource for future projects. It is also a helpful tool when working with contractors.

The plan outline in this chapter is for an interpretive exhibit plan, the most common type of interpretive project plan. It can be adapted for other types of interpretive projects, such as an interpretive trail or audiovisual program. The information gathering and process will remain essentially the same.

The **Interpretive Project Plan** builds on the Interpretation Master Plan and Interpretation Action Plan. When funding becomes available for a task identified in the Interpretation Action Plan, the Project Plan workbook section below can walk you through the steps needed to complete that task.

The Interpretive Project Plan

The Interpretive Project Plan is divided into several sections: the **Executive Summary, Project Setting, Interpretive Direction, Exhibit Design and Fabrication** and **Appendices.** Each of these sections is divided further into numbered chapters.

The **Executive Summary,** which provides a one to two page summary of the project, is the final section that will be written. This summary should provide sufficient information for the casual reader to understand the scope of the project.

The **Project Setting** section includes the situational factors that influence the project. If a General and/or Interpretation Master Plan have been written, you should be able to draft the bulk of this section from those documents. However, additional research should be done to determine if new information exists or if the conditions that existed when those plans were written have changed. The Project Setting section begins with an **Introduction** to the park and project. The **Planning Framework** identifies the project's guiding principles by identifying relevant, previously completed plans, statutes, missions and visions, as well as the interpretive period(s) for the park. A **Resources Summary** provides a summary of key cultural, natural and recreational resources at the park, as well as the collections that can serve as resources for the project. An **Evaluation** chapter identifies at what points certain types of evaluation will occur during the project. The **Existing Conditions** chapter identifies the audience, existing programming that will complement this project, the operational resources available to support it, the stakeholders and partners that could be involved in the planning process—and possibly the project's implementation—and finally key site considerations regarding access, security, safety and sensitive resources.

Interpretive projects are research intensive. It is not uncommon to spend over 50% of your time in the Interpretive Direction and Concept Design phases conducting research in order to develop supporting themes, storylines and text.

The **Interpretive Direction** section defines what the project should achieve and how it will do so. The first chapter lays out the **Goals, Objectives and Strategies** for the project. This project should be meeting goals and objectives identified in the Interpretation Master Plan. However, due to funding requirements, changing priorities or circumstances,

the goals may be expanded or modified. Strategies specific to the project and current conditions may likely need to be drafted specifically for your project. This section also identifies the **Themes and Storylines** for the project. The unifying theme and primary themes for the project should come from the General Plan or IMP. Secondary themes and storylines will likely need to be developed for the specific project. A **Visitor Experience** chapter describes the desired visitor experience with your project, starting with visit planning, continuing to site approach, and to their experiences indoors and outdoors. Finally, **Exhibit Guidelines** specify the interpretive recommendations, and an overview of expectations of the accessibility and life of the project. Sample text for these are included as "boilerplate" in the template at the end of this chapter and can be used verbatim or adapted for your specific project. As you develop this section, you will also be compiling information to include in the appendices, specifically the supporting research and relevant K-12 curriculum standards.

The previous two sections can be developed by park interpreters. However, the next section, **Exhibit Design and Fabrication,** generally requires a specialized skill set that entails using one of the State Parks Service Center exhibit designers or a contractor.

Exhibit Design and Fabrication is typically broken into three phases and thus has corresponding chapters here. It begins with **Concept Design,** then moves to **Design Development,** and finishes **Exhibit Fabrication and Installation.** These chapters are formatted to use as deliverables when working with contractors to ensure that you receive the minimum acceptable designs.

The final section contains the **Appendices.** Information useful as appendices includes: background research, a list of references and resources used to develop the plan, the curriculum standards that are relevant to your project, accessibility guidelines that are relevant to your project, a copy of the final budget and a timeline/action plan. Additional appendices that you may include, depending on the type and complexity of your project, could include: collections inventory, object lists, summaries of additional relevant plans, copies of important communications and meeting notes.

The Contents of an Interpretive Project Plan

The information included in an Interpretive Project Plan and the level of detail will vary from plan to plan. A set of five panels is far less complex than a 2000-square-foot visitor center or house museum. Yet both projects require the same thought process. At a minimum, you should consider and document the following in your Interpretive Project Plan:

EXECUTIVE SUMMARY

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PROJECT SETTING

Chapter 1: Introduction

1.1 Site Overview

1.2 Project Overview

1.3 Plan Purpose

1.4 Planning Process

Chapter 2: Planning Framework

2.1 Existing Plans and Statutes

2.2 Mission and Vision Statements

2.3 Interpretive Period

Chapter 3: Park Resources Summary

3.1 Cultural Resources

3.2 Natural Resources

3.3 Recreational Resources

3.4 Collections

Chapter 4: Existing Conditions

4.1 Visitor Assessment

4.2 Existing Interpretation and Education

4.3 Operational Resources

4.4 Partners

4.5 Stakeholders

4.6 Site Considerations

Chapter 5: Analysis

INTERPRETIVE DIRECTION

Chapter 6: Goals, Objectives and Strategies

6.1 Goals

6.2 Objectives

6.3 Strategies

Chapter 7: Themes and Storylines

7.1 Themes

7.2 Storylines

Chapter 8: Visitor Experience

8.1 Visit Planning
8.2 Site Approach
8.3 Outdoor Experience
8.4 Indoor Experience
8.5 Sales

Chapter 9: Exhibit Guidelines

9.1 Interpretive Recommendations
9.2 Accessibility
9.3 Longevity
9.4 Donor and Sponsor Recognition

Chapters 8.3, 8.4, 8.5, 11.2, 11.3 may not be relevant to all plans. However, all other chapters should be consistent regardless of the level of complexity of the project.

EXHIBIT DESIGN AND FABRICATION

Chapter 10: Concept Design

10.1 Site Plan
10.2 Exhibit Description
10.3 Concept Sketches

Chapter 11: Design Development

11.1 Scaled Plan and Elevations
11.2 Lighting and Electrical Plan
11.3 Exhibit Furnishings and Components
11.4 Design Elements
11.5 Text
11.6 Photographs and Artifacts List

Chapter 12: Exhibit Fabrication and Installation

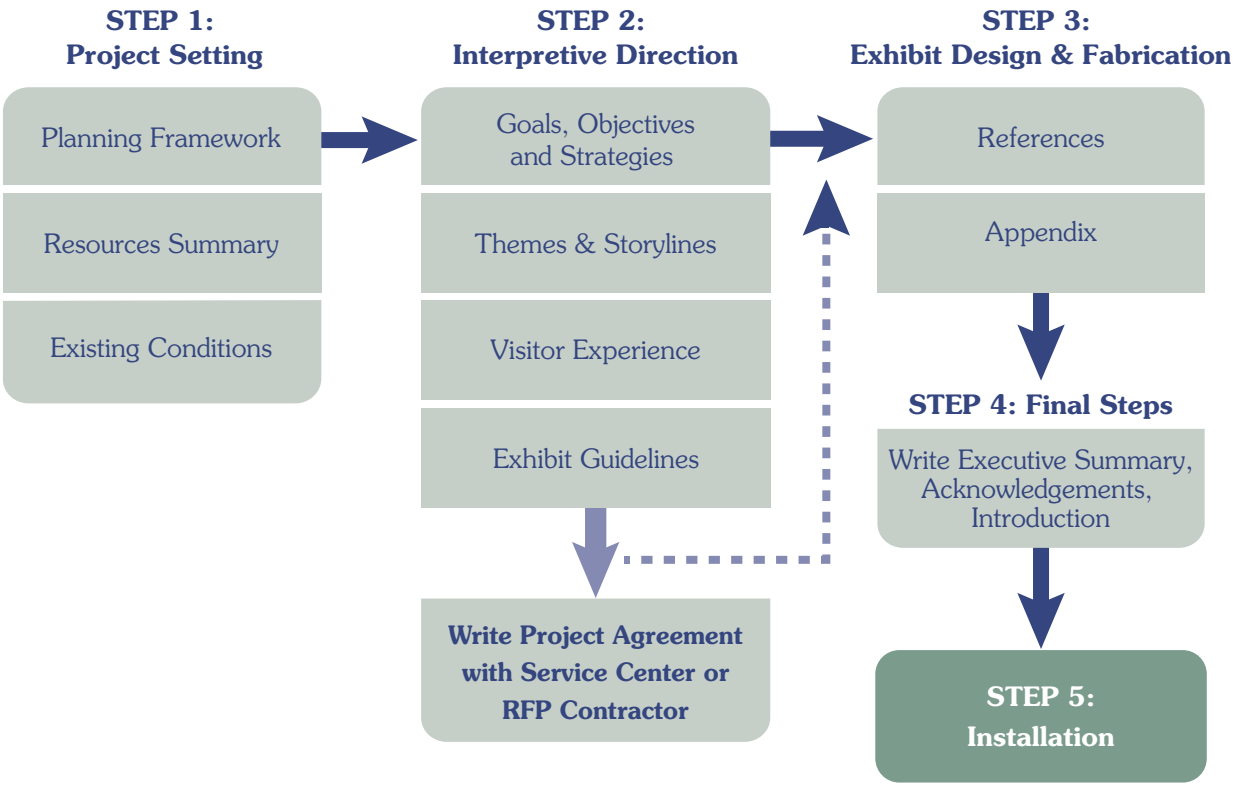
12.1 Shop drawings
12.2 Fabrication Guidelines
12.3 Installation Guidelines
12.4 Upkeep/Housekeeping Plan

APPENDICES

1. Research Summary
2. Plan References
3. Relevant K-12 Curriculum Standards
4. Relevant Accessibility Standards
5. Budget
6. Timeline
7. Evaluation Data and Plans

Suggested Steps to Writing an Interpretive Project Plan

Begin writing your Interpretation Master Plan with the Project Setting, then the Interpretive Direction, and then the Exhibit Design and Fabrication. As you work, keep your Appendices sections current. The last step is to complete the Executive Summary and Acknowledgements and finalize the introduction.



You will likely write a draft introduction once you have completed the Interpretive Direction Section in order to provide an introduction to the project to the exhibit designer that you will be working with. The Introduction should be revisited at the end of the project to determine if additional information or updates are needed.

Writing an Interpretive Project Plan

Completing the steps outlined in this Interpretive Project Plan chapter will help ensure that you have a successful project. By documenting your work along the way, you can help create a record that will be useful for people who come into the project late, contractors who complete only certain elements of the project, future employees who may need to replace or update a portion of the project, or other people planning to complete a similar project.

Everybody has their own approach to writing; however, this outline is designed to be as sequential as possible. That said, planning is not is a linear process, so if you begin writing as you do your research, you can anticipate making several sets of revisions as new information comes to light or changes are made to your project.

Certain elements of chapters 1 through 9 may benefit from engaging the services of somebody outside of your park or district.

For example, using an outside facilitator for public meetings allows you to participate in the discussion. They can also help mediate conflicts that may occur between stakeholders without seeming like State Parks is taking one side or another.

Visitor surveys can also benefit from engaging a professional firm. Like interpretation, survey design is both an art and a science. There are certain techniques that ensure questions are not leading, biased, or unclear.

Generally speaking, chapters 1 through 9 can be completed by California State Parks staff—either from the field, headquarters or a Service Center. The concept design may be completed by State Parks staff if staff members with the skill set for this are available. However, once you begin getting into exhibit design, fabrication and installation, (Chapters 9-12), it is **strongly** recommended that you acquire the services of a professional exhibit designer—either from one of the Service Centers or an interpretive exhibit firm. The content listed in these chapters is the minimum that should be provided

by an exhibit designer and can be used to help structure RFPs and confirm deliverables. As each milestone is reached (concept design, design development, fabrication and installation), the interpreter in charge of the plan should incorporate the final documents into the plan to serve as a record of how the project evolved and was completed.

It may be helpful to review one or more Interpretive Project Plans to see how other parks have assembled their documents (e.g. writing style, level of detail, use of graphics, captions). Other park Interpretive Project Plans can be found on the UDF or in District, Interpretation and Education Division, and Service Center libraries.

Executive Summary

The executive summary should be written after the rest of the plan is completed. It should be no more than two pages and should contain enough detail that if it were the only section read it would give the reader a general idea of what the project entails.

Acknowledgements

The acknowledgements section should be written after the rest of the plan is completed. It should identify and thank key participants involved in the planning process, and it should also recognize other supporters, including those involved with the funding and/or management of the planning project.

Table of Contents

The table of contents should include at least the Section Headings and main chapter numbers.

Project Setting

This first section describes the setting in which you are doing your project. Going through the process allows you to consider parts of your park that you may not have thought about before. It also serves as an introduction and overview for any contractors you might work with. Finally, the information gathered in this section, once analyzed, will help you develop your goals, objectives and strategies.

Chapter 1: Introduction

The Introduction should serve to introduce the reader to the project site, the project, the planning document and the planning process.

1.1 Site Overview

- Briefly describe the park for those who are not familiar with it.
- Describe the park's location (e.g. in the Sierra Nevada, 30 minutes outside Tahoe City).
- Describe the park's physical setting (e.g. desert, beach, urban)

- Identify key attractions (e.g. historic building(s), natural features, recreational activities).
- Include a map that shows the park's location in the general region and relative to nearby cities, other recreation sites, interpretive providers, etc.
- Include more specific site location map(s) showing key park features.
- Include images of the intended project site and features in the park that relate to or have bearing on this plan.

SENSE OF PLACE is often used to describe either the intrinsic character of a place or the meaning people give to it. Often a sense of place incorporates both these elements.

- Explain when and how the site was acquired and classified.
- Identify key events, people or groups that contributed to the park's history and/or significance (e.g. gold discovery, Spanish missionaries, CCC, etc.).
- Quote your park's Sense of Place statement if included in the General Plan.

1.2 Project Overview

- Describe how this project is being funded
- Explain why this project is being done at this time
- Identify the components of this project (e.g. wayside panels, house museum, A/V program) and whether it is part of a larger project (e.g. campground rehabilitation, trail improvements).
- Identify the source of funding for the project (e.g. Major Capital Outlay, deferred maintenance, Accessibility).

1.3 Plan Purpose

- Identify the purpose of this plan—what will it achieve.
- Include any specific purposes for this particular plan.
- Identify the intended lifespan of the plan (e.g., how long it will be used and/or when it should be updated).

1.3 Planning Process

- Briefly describe the process used.
- List the planning team members and their roles.
- Identify when planning started and finished.
- Summarize the process of public involvement (e.g. stakeholder meetings, surveys, interviews).

Chapter 2: Planning Framework

The Planning Framework describes all previous planning that will help set the direction of this project. It includes additional fundamental guidelines, such as national, state, or local designations, and mission and vision statements.

2.1 Existing Plans and Statutes

- General Plan
  - › Identify if there is a General Plan.
  - › State which chapters of the General Plan are relevant to this project and summarize their contents.
  - › Restate the park's Declaration of Purpose.
- Interpretation Planning
  - › Identify any previous interpretation planning (e.g. IMP, Prospectus, other Interpretive Services plans)
  - › Summarize their relevance to this project.
- Other Relevant Plans or Statutes
  - › Identify other relevant plans, reports or designations that could impact this project (e.g. marketing plan, historic landscape report, National Register of Historic Places).

The relevant information in a General Plan will vary depending on when it was completed. Some plans have specific interpretive guidance, others may simply assist by providing an overview of the site's history and/or resources. At the very least though, the General Plan will identify the primary purpose of your park.

2.2 Mission and Vision Statements

- Restate the California State Parks Mission: *To provide for the health, inspiration and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high-quality outdoor recreation.*
- Restate the California State Parks Interpretation Mission: *Interpretation is a special form of communication that helps people understand, appreciate, and emotionally connect with the rich natural and cultural heritage preserved in parks. It is the mission of interpretation in California State Parks to convey messages that initially will help visitors value their experience, and that ultimately will foster a conservation ethic and promote a dedicated park constituency.*
- Restate the California State Parks Education Mission: *The most powerful forms of education are meaningful, involve the student, promote critical thinking, and appeal to different learning styles. Our mission is to provide educational experiences both in California State Parks and in the classroom, assisting*

educators with curriculum needs and offering activities that enable students to investigate, research, and participate in interactive learning.

- State the park's mission and vision for interpretation. If the park does not have one, you can simply state that the park does not have these. The mission and vision for interpretation should be developed as part of the Interpretation Master Plan process when you are taking a more holistic view of the park.
- Optional:
  - Develop a mission and/or vision for this project.
  - Restate the mission and/or vision of another division within the department (e.g. Off-Highway Vehicles).

2.3 Interpretive Period

- Restate the park's interpretive periods from the General Plan or IMP.
- Identify which periods are relevant to this project.
- If an interpretive period has not been previously identified, acknowledge this and describe the time period(s) which this project will interpret.

Chapter 3: Park Resources

The Park Resources Summary chapter provides an overview of the resources that will be interpreted in this project. It simply provides a brief summary of the park resources; you will go into greater detail in the research packet, the storylines and the final text. A list of all resources such as species and objects and/or timelines could be included in the Appendix. As you research this section, be sure to keep good notes; the specifics and interesting facts may make their way into your final product.

A picture is worth a thousand words. Consider including images. Images help readers get a sense of the site. This is particularly helpful if this plan is being partially developed as an attachment to a design, fabrication and installation RFP.

If the park has a post-2007 recent general plan, or has an Interpretation Master Plan, these may contain an Interpretive Significance statement that will list resources considered significant to interpret at the park.

3.1 Natural Resources:

- Summarize the park's representative plants, animals, ecosystems, weather, climate, geological features, etc.

- Identify the key plants, animals, and geological features that will be interpreted in this project.
- Identify any local, state, and/or national designations (e.g. a national natural landmark) and if these designations will affect the project or be interpreted through it.

3.2 Cultural Resources

- Summarize the human stories that are representative of your park.
- Identify the key human stories that will be interpreted through this project.
- Identify any local, state, and/or national designations for these resources (e.g. the National Register of Historic Places) and state if these designations will affect the project or be interpreted through it.

3.3 Recreational Resources

- Summarize the recreational resources and activities that are common to the park.
- Identify recreational resources or activities that will be interpreted through this project.

3.4 Collections

- State if collections will be used in this project (e.g. tangible objects, photographic images).
- Identify types of museum collections that could be used in this project (e.g. archeological, paleontological, historic furnishings, photographs)
- Identify specific items that could be used in this project or are needed. Say whether State Parks has the objects in their collections and the rights to use them, and, if not, where they could be found. If this list is long, put into an appendix.
- At the end of the project, return to the list. Update it to include any new purchases and identify which objects or artifacts were used in the exhibit.
- Identify the interpretive collections that could be used in this project. (See the Interpretive Objects checklist on page 237 for ideas.)

Museum collections are objects maintained for use in exhibits, research and publications. These can include archaeology, paleontology, natural history specimens, and/or historic firearms. Interpretive collections are objects from park collections, including hands-on replicas, that are used for interpretive purposes.

Identify types of museum collections that might be used in this project.

Chapter 4: Existing Conditions

This chapter documents the conditions at the park and in the vicinity at the time that the plan is being written. This chapter is particularly important if the project is being funded in stages, or if you are hiring a contractor to do extensive exhibit design.

4.1 Visitor Assessment

The best way to learn about your visitors is to conduct a "front-end evaluation." This evaluation can help you identify key characteristics of your potential audience, such as who is coming to the park, and what their current state of knowledge, interest, and attitudes may be. Use the front-end evaluation to describe your visitors and develop your goals, objectives and themes. Raw data and questionnaires should be included in an Appendix.

There are many ways to learn about your park's visitors. You can conduct interviews with staff and volunteers who encounter them on a daily basis, observe visitors as they move around the park, or administer visitor surveys. Take care when using other sites' data however; the people who visit Hearst Castle may not have the same knowledge, interests and attitudes as the people who visit Anza-Borrego or even another historic site. Even within the same park—for example Angel Island—people have many different reasons or interests for visiting one part vs. another.

- Describe the key visitor groups to whom you wish to interpret this project. Be as specific as possible. "The General Public" is not an appropriate description. You can identify by user group (birders, equestrians, campers, boaters, etc.), by social group (families, tour groups, church groups, etc), demographics (age, gender, languages, etc). Questions to ask yourself, or better yet, your visitors, include, but are not limited to:
  - Why do people come to your park/project site?
  - What activities do people like to do at your park/project site?
  - What are the interests of the people who come to your park/project site?
  - What do visitors want to know about your site?
  - What is the visitors' background knowledge about the topics you will be interpreting at your project site?
  - What are your visitors' ages?
  - Where do they come from?
  - What language(s) do they speak and read?
  - Do school groups come to your site? If so, what grades? For what topics?
  - Do teachers teach about your site, but not have the means to physically visit?
  - Are certain groups underrepresented among park visitors? Can this project reach them?

When assessing the school groups that could be served by your project, refer to the California State Content Standards, the Common Core Standards, and the California State Education and the Environment Initiative. Provide a list of the standards that the project could meet in an Appendix.

4.2 Existing Interpretation and Education

- List the types of interpretation that the park provides, both personal and non-

personal (e.g. campfire programs, Junior Ranger, school programs, self-guided trails) and when and where they are provided. See the checklist in appendix E for additional types of park programming.

- Describe if any of these will be affected by your project.
- List other interpretive and/or educational sites in the local area and briefly describe their programming. Note if any of these could enhance or compete with your project. These should include other California State Parks, other governmental agencies, and private institutions. The checklist in the workbook appendix E can help you think of organizations to consider.

What do visitors want to know about your project site?

4.3 Operational Resources

- Describe the staffing levels at the park and how many people—paid staff or volunteers—will be available to implement or care for this project.
- Describe the infrastructure at the park and how it may affect or be affected by your project.

4.4 Partners

- Identify the park's partners.
- Identify the role the park's cooperating association (if there is one) will have in the development and implementation of this project.
- Identify any need for donor or sponsor recognition. See page 6 in *Chapter One: Success Starts Here* for more on donor and sponsor recognition.

4.5 Stakeholders

- List internal and external stakeholders. Refer to section 1.6, "Involving Stakeholders," in "Success Starts Here" for suggestions on who may be a stakeholder.
- Identify the role that stakeholders will play in the development and implementation of your project.

- Identify any need for donor or sponsor recognition. See page 6 of *Chapter One: Success Starts Here* for more on donor and sponsor recognition.

4.6 Site Considerations

- Describe how people will access your project site. Describe any special concerns regarding safety, accessibility, etc.
- Describe any security concerns and steps being taken to address them.
- Describe any safety concerns regarding the project location and steps being taken to address them.
- Describe if any sensitive natural or cultural resources exist in the project area, and the steps being taken to avoid or interpret them

Chapter 5: Analysis

The previous chapters are largely an inventory of what has been done before and what currently exists in your park. The previous planning, regulatory statutes, the park resources, and existing conditions provide the context for your project. Bringing these various elements together to see how they interact and will impact your project is the role of the analysis. As you conduct your analysis, some questions to ask yourself include:

- Where do visitor interests overlap with the natural, cultural and recreational resources?
- Are there unmet needs/desires of the visitors?
- Are there topics that you should interpret at your park that may require special handling based on the visitors' existing knowledge and attitudes?
- Are the operational resources sufficient for the project that you are planning?
- Are the collections sufficient, or will we need additional acquisitions?
- Are there resource protection or safety issues that should be addressed?
- Are there stakeholders with whom you will need additional consultation?
- Will there be a need for donor or sponsor recognition in the final project? See page 6 of *Chapter One: Success Starts Here* for more on donor and sponsor recognition.
- Other?

A thorough and thoughtful analysis will set you on track to develop the next section, the Interpretive Direction. It should provide a logical link between what you have and the recommendations that you will make.

Interpretive Direction

The Interpretive Direction builds off the information identified in the Project Setting, and

in any previous General or Interpretation Master Planning. The Interpretive Direction describes the outcomes and impacts that you hope your project will have and the key messages and stories that you will share through it. It will provide the basis from which the exhibit designer and writer will work.

Chapter 6: Goals, Objectives and Strategies

Setting goals and objectives will help you focus your project and return to it at a later time for evaluation to see if you were successful. An increasing number of funders require measurable objectives and evaluation as part of their grant-making process.

6.1 List the goals for your project

6.2 List the objectives for your project

6.3 List the strategies for your project

Formative Evaluation is a powerful tool that you will ideally use at least once during the development of the interpretive direction and/or the exhibit design. You can use formative evaluation to test your themes and storylines—are you conveying to the visitor that which you want to?

You can also use it to assess if your visitor flow will work as anticipated or if people will interact with and understand exhibits as intended. You can conduct these evaluations through surveys, on-site testing, formal focus groups, etc.

Although evaluation adds cost and time to a project, it is better to determine that something isn't working before you spend the money to fabricate and install it. See page 40 in *Chapter One: Success Starts Here* for more on formative evaluation.

Chapter 7: Themes and Storylines

Themes are the key messages that interpreters hope visitors will retain after their visit. Definitions of the levels of themes can be found in the glossary. Storylines expand on the themes by outlining the key ideas and facts that support or illustrate the theme. Storylines serve as a guide for interpretive writers and exhibit designers in the exhibit concept and design phases. Therefore, storylines are initial guides; the final details, titles and text are subject to refinement and change during the final design process.

7.1 Themes

- List the unifying theme for the park or for your project
- List the primary theme(s) for your project

- List the secondary theme(s) for your project
- List the supporting themes for your project

Depending on the scope and scale of your project, the unifying theme for your project may be the unifying theme from the IMP or one of the primary themes identified in that document. Secondary and supporting themes may come from the IMP, or be developed specifically for this project.

7.2 Storylines

- Describe the storylines and identify the themes that they will illustrate.

Chapter 8: Visitor Experience

This section should describe the current visitor experience in your project area and identify any changes that you wish to make to create the desired visitor experience.

8.1 Visit Planning

- Describe how visitors learn about your park
- Describe how visitors will learn about your project before they visit the park

8.2 Site Approach

- Describe how visitors approach the park (major highway, through a city? In personal vehicles? Public transportation? Bicycles/on foot?).
- Describe how visitors will approach your project area.
- Identify any challenges visitors may have in getting to your project area (e.g. terrain, distance, signage).

8.3 Outdoor Experience

- Describe the outdoor elements of your project (e.g. number of panels, program area, landscaping).
- Describe the desired way that visitors will interact with the outdoor space.

8.4 Indoor Experience

- Describe the indoor elements of your project.
- Describe the desired way that visitors will interact with the indoor space.

8.5 Sales

- State if there will be a cooperating association sales area
- Identify its location

Cooperating Association Sales Areas are usually part of large projects such as visitor centers. They are generally funded separately, but the design of the space should be done in coordination with the design of the larger center in which they reside.

- State whether its design and development is part of your project

Chapter 9: Exhibit Guidelines

This section should identify interpretive priorities that the exhibits need to address. At this stage, these priorities should focus on the desired intent of the exhibit. The guidelines are not the place where you identify the specific media or graphic design elements (e.g. develop a panel with illustrations of birds); those come during Concept Design and Design Development through collaboration between the interpreter and designer.

9.1 Interpretive Recommendations

- Identify priorities for your project. Questions to consider are:
  - Does your target audience include a significant number of people not fluent in English? If so, do you want some or all text translated, or do you want to use an approach that emphasizes graphic communication over written? (Especially consider the latter if there are multiple languages that you would need in translations.)
  - At what grade level should text be written?
  - Does this project need to incorporate design elements that help brand your park?
  - Are there specific topics that need to be handled in a certain way?
  - Are there supplementary interpretive activities that will support and be supported by the project? (See "Supplementary Interpretive Activities" checklist on page 242, "Demonstrations" checklist on page 244, and "Period Participatory Activities" checklist on page 245, Appendix E.)

9.2 Accessibility

- Summarize the minimum expectations for accessibility. These include, but are not limited to, using appropriate font styles and sizes, contrast, colors, captioning audiovisual programs, etc.

9.3 Longevity

- State the minimum amount of time that exhibits for your project should last.

The minimum expected life of an exhibit varies greatly. Outdoor panels should last at least five years; "permanent" visitor center exhibits, fifteen. In some cases, such as Major Capital Outlay projects, there is an expectation that exhibits will last at least up to 20 years. In other cases, exhibits are designed to be temporary. How long your exhibits must last will significantly impact the design, the materials and the cost.

9.4 Donor and Sponsor Recognition

- State whether the project will include donor and/or sponsor recognition, and any parameters that must be met (e.g., levels of sponsorship to be acknowledged, incorporation of non-departmental logos). Exact specification of recognition elements will take place as part of Concept Design and Design Development. See page 6 of *Chapter One: Success Starts Here* for more information on donor and sponsor recognition.

Exhibit Design and Fabrication

The Exhibit Design and Fabrication Section should include the sketches, drawings and plans for the exhibit. Completing these sections will require the skills of a graphic designer, exhibit designer, exhibit fabricator and possibly specialized installation labor. As you work through the exhibit design process, you will likely have multiple drafts of each exhibit. It is not necessary to include all drafts in the final plan. For Chapters 9, 10 and 11 it is sufficient to simply include the final submittal.

Chapter 10: Concept Design

Once you have established what you want to convey, the next step is to determine what methods and materials will best convey the information. The Concept Design Phase involves rough sketches and often "Greeked" text—dummy text used to fill text areas when developing layout. By the end of this phase, you should have a sense of the mediums and methods you will use, and how each of your goals, objectives and themes will be met and conveyed.

If a Service Center Exhibit Designer is involved in developing the earlier sections of an Exhibit Plan that will be completed and implemented by an outside exhibit firm, they may develop and include concept sketches in the draft plan that is provided to the outside firm at the start of the contract. It is also common to include preferred media and methods in this draft plan. The amount of work to do before contracting is flexible, and will depend on both individual preferences and the skill sets of State Parks personnel involved in developing information for the contractor.

10.1 Site Plan

- Provide a scaled plan of the project site.
  - Indicate the general location of exhibits or exhibit areas using "bubbles." The bubbles indicate the relationship or chronology between subject areas. Each bubble should be titled and identified with a number or letter for easy reference. (e.g. Area 1, Dune Ecology or Area A, Mexican California Period).
  - Diagram with arrows showing the proposed visitor flow through the exhibits

10.2 Exhibit Description

Include a written description, either as a narrative description or as a table, that identifies, at a minimum:

- The exhibit (area) (identified in the bubble diagram in 10.1),
- Proposed modifications to the building or setting for the exhibit (see checklist on page 240, Appendix E.)
- The overarching topic or storyline for each exhibit (area), (Section 2, Chapter 7.2)
- The theme(s) that will be interpreted in each exhibit (area), (Section 2, Chapter 6)
- The proposed artifacts, objects or graphics that will support each exhibit (area), (section 1, chapter 3.4 And/or appendix) (see the "Interpretive Objects" checklist on page 237 and the "Graphics" checklist on page 238 of Appendix E for ideas.)
- The media or method of delivery used by the exhibits in each area (TBA during the concept design phase) and
- The goals and objectives (Section 2, Chapter 5) met by each exhibit area.

10.3 Concept Sketches

- Concept sketches for exhibit areas with suggested media and method for delivering interpretive messages (e.g. panels, multi-media, topographic model, diorama). See "Design Concepts" checklist on page 241, Appendix E.

Chapter 11: Design Development

The Design Development phase involves translating the conceptual sketches of the Concept Phase into detailed plans that include text, placement of final graphics and artifacts, and other details sufficient to give final approval to move into fabrication.

11.1 Scaled Plans and Elevations

- Final view of each exhibit identified by title and number, with artifacts, graphics, objects and final text placed.

Exhibit plans are "overhead" views of the project site (i.e. floorplan); elevations are drawings that show the exhibit as it would be viewed by the visitor (i.e. wall views).

11.2 Lighting and Electrical Plan

- Placement of tracks and fixtures
- Specific task lighting
- Lamp type and manufacture
- Light control equipment
- Projected lux and ultraviolet measurements
- Mitigation techniques for natural light (where UV is an issue)

11.3 Exhibit Furnishings and Components

- Drawings of furniture, platforms, risers, exhibit cases and interactive components

11.4 Design Elements

- Identify the color palette used for the exhibits
- Identify the fonts used in the exhibits.

11.5 Text

- Include final text for exhibits and any audio/visual programs

11.6 Photographs and Artifacts List

Chapter 12: Exhibit Fabrication and Installation

Once the designs are agreed upon, the shop drawings are made. These are the drawings (blueprints) that fabricators use to construct the exhibit components. The drawings call out all materials, dimensions, construction methods, etc. that will be used in constructing and finishing the exhibits.

Items under this section as well as all working drawings, media permissions, media files, warranties, etc. should be provided by the contractor at the end of the project in the form of a hard copy Maintenance Manual and a disk including this and all associated digital files.

If working with an outside contractor, consider asking an exhibit designer at one of the Service Centers to review the design development plans and working drawings. They can help make sure that the correct materials are being proposed and sound construction techniques will be used. Changing things that don't work after they are installed can be somewhat to extremely costly.

12.1 Shop Drawings

Include:

- Exhibit components dimensioned shop drawings,
- Fabrication layouts and floor plans

12.2 Fabrication and Installation Guidelines

- Call out specific codes or requirements that must be met. (e.g. LEED Standards)
- Use of new or historic materials

12.3 Installation Guidelines

- Limitations on when contractor can access the site (e.g. due to weather, nesting).
- Building codes for electrical work
- Seismic considerations

- Constraints for working in historic buildings

Installation guidelines should include any constraints for working in historic buildings.

12.4 Upkeep/Housekeeping Plan

- Follow manufacturer's maintenance procedures, so as not to violate the warranty
- Identify recommended maintenance activities to prolong the life of the exhibits

Appendices

1. Research Summary

- Summarize the research that was used to write the themes and text.

2. Plan References

- Using a consistent accepted style (Chicago, MLA, APA), cite all references, written, video, personal, etc., used to develop this project

3. Relevant Curriculum Standards

- Initially identify which of the California State Standards and Frameworks could be met by this project.
- In the final product, identify which standards were met by the project.
- Initially identify which principles of the Education and the Environment Initiative could be met by this project.
- In the final product, identify which principles were met by this project.
- Initially identify which of the Common Core Standards could be met by this project.
- In the final product, identify which standards were met by the project.

4. Relevant Accessibility Standards

- Include the standards set out in *All Visitors Welcome* and the *California State Parks Accessibility Guidelines* that pertain to this project.

5. Budget

- Include your proposed and final budget for the project planning
- Include your proposed and final budget for the Design phases
- Include your proposed and final budget for the Fabrication and Installation phase
- Include your proposed budget for annual Upkeep and Maintenance

See the "Project Budget" checklist on page 234, and Appendix E, "Interpretive Projects Costs and Time," for suggestions of what to include in the budgets, their potential costs, and time estimates for development.

6. Timeline

- Include the project timeline

7. Evaluation data and plans

- Front-end
- Formative
- Summative

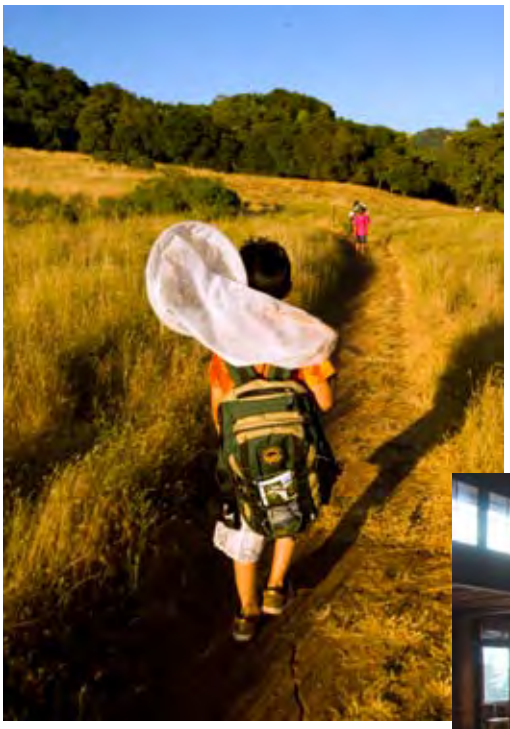
Other appendix items could include:

- Surveys
- Stakeholder Meeting Notes
- Scope of Collections Statement for the park
- Educational Frameworks and Content Standards
- Computerized Asset Management Program (CAMP) Interpretive Activity Data

Frank Balthis, 2012

Congratulations! Good planning and follow-through have paid off with new park interpretation.

3.2 INTERPRETATION PROGRAM PLAN



Programs include school group nature activities, Environmental Living Programs, and public tours.

Personal interpretation adds life to a site, creating and reinforcing natural and cultural resource connections in ways that participants may remember for the rest of their lives. Personal interpretation covers the spectrum from the most casual form, such as a five-minute impromptu interpretation contact, to carefully-planned and budgeted group programs that are given on a regular basis for years. With a good, well-executed plan, even the most elaborate personal interpretation can run smoothly and effectively, meeting objectives and creating life-long memories for every participant.

Full Interpretive Program Plans (IPP) are intended to guide the development and implementation of new large-scale personal interpretive services, such as Environmental Living Programs, and other recurring programs such as school tours or historic activity demonstrations that will be presented on a regular basis for years to come. You would not complete an Interpretive Program Plan in the detail given in this chapter to plan a campfire program that you will only be presenting a few times, though you might still find this chapter helpful to develop objectives, choose themes, organize material and plan

evaluation techniques. Chapter 4—Planning, of California State Parks' *Basic Interpretive Learning System*, is designed to guide you through planning simpler interpretive programs.

> **The interpretive program plan will be a "living document" from the time it is begun until the last program is presented. For example, program delivery methods may change in response to evaluation, administration tools and materials may be updated, and new research may add to the background information. Revise the document as these and other changes occur. The plan is not only for putting together a brand-new program; it will be a useful tool for administrators and presenters for a long time to come.**

The interpretive program plan will help you:

- Create a program that reaches underserved audiences and/or meets needs and interests not met by other programs in the park area.
- Tailor the program to the needs and interests of the target audience
- Document background research on which the program is based.
- Create a well-structured, accurate, enjoyable and effective program.
- Identify funding needs and sources, including one-time and ongoing donors and sponsor.
- Share program concepts, objectives and structure when seeking funding.
- Document program administration tasks.
- Document program participation rules and requirements.
- Document program tool, material, and staffing requirements.
- Document the "how-tos" of program hands-on activities.
- Detail tasks that must be done to get the program off the ground.

Research for an Interpretive Program Plan

Information regarding the research phase of interpretive planning is included in the "Success Starts Here" chapter. It gives helpful information regarding data sources, such as district and park staff, State Parks archives and the Unit Data File (UDF), which may contain State Parks publications, reports, previous interpretive planning and other documents for the unit.

More detailed information on data collection and analysis is included in the 'Writing an Interpretive Program Plan' section below. That section will also refer you to relevant checklists in Appendix E for research sources and planning ideas.

Contents of an Interpretive Program Plan

The Interpretive Program Plan is divided into four main sections: **Program Context, Interpretive Direction, Program Design, and Program Administration and Implementation**. These sections are divided further into numbered chapters. An **Executive Summary, Acknowledgements, Table of Contents, References,** and **Appendices** round out the document.

IS THERE A POLICY FOR THAT?

As you research, analyze and make decisions on program media, methods and activities, be sure to consult the DOM Interpretation chapter (DOM 0900) to check for any department policies that may affect program planning and implementation. For example, before using live domestic animals in a program, staff will need to complete a livestock management plan and have it approved by the district superintendent. There are also department policies on use of native animals, natural history specimens, living history, demonstrations and other media and methods.

The **Executive Summary, Acknowledgements, References,** and **Table of Contents** are covered in more detail in the "Success Starts Here" chapter of this workbook.

The **Program Context** provides park and resource background information to put the program in context. Developing this section allows you to consider including potential partners, target audience members and significant topics for park interpretation that you may not have thought about before. Large parts of this section will be useful for inclusion in program presenter and participant guides. It also serves as an introduction and overview for potential funders who are unfamiliar with the park, its services and the audience. Finally, the information gathered in this section, once analyzed, will help you develop goals, objectives and strategies.

The **Interpretive Direction** builds on the information in the Program Context, on State Parks system-wide plans and policies, and on past park interpretation planning. The Interpretive Direction describes the outcomes and impacts that you hope your program will have and the key messages and stories that you will share through it. It will provide the basis for the detailed program design.

In the **Program Design** section you are finally ready to get down to the nuts and bolts of program media and methods. People are often tempted to jump straight to this level of planning when developing a new program, then find out later that their program is not as well received and effective as they had hoped. You will find that taking the time to do the background research, analysis, strategizing and evaluation included in the Program Context and Interpretive Direction sections will give you major payback in the long run. It is worth taking this extra time to develop a program that will be serving visitors—and your park resources—for years to come.

Program Administration and Implementation is exactly what it says. In this section you address the tasks that will make the program a reality and keep it going smoothly.

The **Appendices** are where you put background information that is too valuable to leave out, and too detailed to include in the main planning document sections. Examples include detailed plant and animal lists, visitor survey narrative responses, sections of relevant curriculum content standards and lists of schools or other interpretive opportunities in the region.

The information, and its level of detail, included in an Interpretive Program Plan will vary from plan to plan, depending on the park's interpretation and education programming and resources. It must include something on each of the items in the template below, at a minimum.

Interpretive Program Plan Template

EXECUTIVE SUMMARY

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

PROGRAM CONTEXT

Chapter 1: Introduction

1.1 Program Overview

1.2 Plan Purpose

1.3 Planning Process

1.4 Site Overview

Chapter 2: Planning Framework

2.1 Existing Plans and Statutes

2.2 Mission and Vision Statements

2.3 Interpretive Period(s)

Chapter 3: Resources Summary

3.1 Cultural Resources
3.2 Natural Resources
3.3 Recreational Resources
3.4 Collections

Chapter 4: Existing Conditions—Inventory and Analysis
4.1 Existing Interpretation and Education Opportunities
4.2 Operational Resources
4.3 Partners
4.4 Stakeholders
4.5 Site Considerations
4.6 Audience/Visitor Assessment

Chapter 5: Summary of Analysis

INTERPRETIVE DIRECTION

Chapter 6: Goals, Objectives and Strategies

Chapter 7: Program Themes

Chapter 8: Participant Experience
8.1 Program Participation Planning
8.2 Site Approach
8.3 Program Experience
8.4 Potential Program-Reinforcing Sales
8.5 Post-Program Experience

Chapter 9: Program Guidelines
9.1 Interpretive Recommendations
9.2 Educational Recommendations
9.3 Accessibility

PROGRAM DESIGN

Chapter 10: Pre-program Preparation

Chapter 11: Site Plan

Chapter 12: Bubble Diagram or Stop/Station List

Chapter 13: Program Outline

13.1 Introduction

13.2 Body

13.3 Conclusion

Chapter 14: Post-Program Reinforcement

PROGRAM ADMINISTRATION AND IMPLEMENTATION

Chapter 15: Staffing Needs

Chapter 16: Program Administration

16.1 Publicity

16.2 Reservations (if applicable)

16.3 Teachers/Participants Packets (if applicable)

16.4 Presenter Training

16.5 Teacher/Assistant Training (if applicable)

Chapter 17: Formative Evaluation Plan

17.1 Evaluation Objectives

17.2 Timeline

17.3 Evaluation Method(s)

17.4 Data Analysis

17.5 Evaluation Follow-up and Use

Chapter 18: Summative Evaluation Plan

18.1 Evaluation Objectives

18.2 Timeline

18.3 Evaluation Method(s)

18.4 Data Analysis

18.5 Evaluation Follow-up and Use

Chapter 19: Upkeep/Housekeeping Plan

Chapter 20: Proposed Program Schedule at Full Implementation

Chapter 21: Budget

21.1 Direct Program Costs

21.2 Administration

Chapter 22: Donor and Sponsor Plan

22.1 Donor and Sponsor Solicitation

22.2 Donor and Sponsor Recognition

Chapter 23: Program Implementation Plan

23.1 Tasks to implement program plan

23.2 Proposed Staff Responsibilities

23.3 Proposed Implementation Timeline

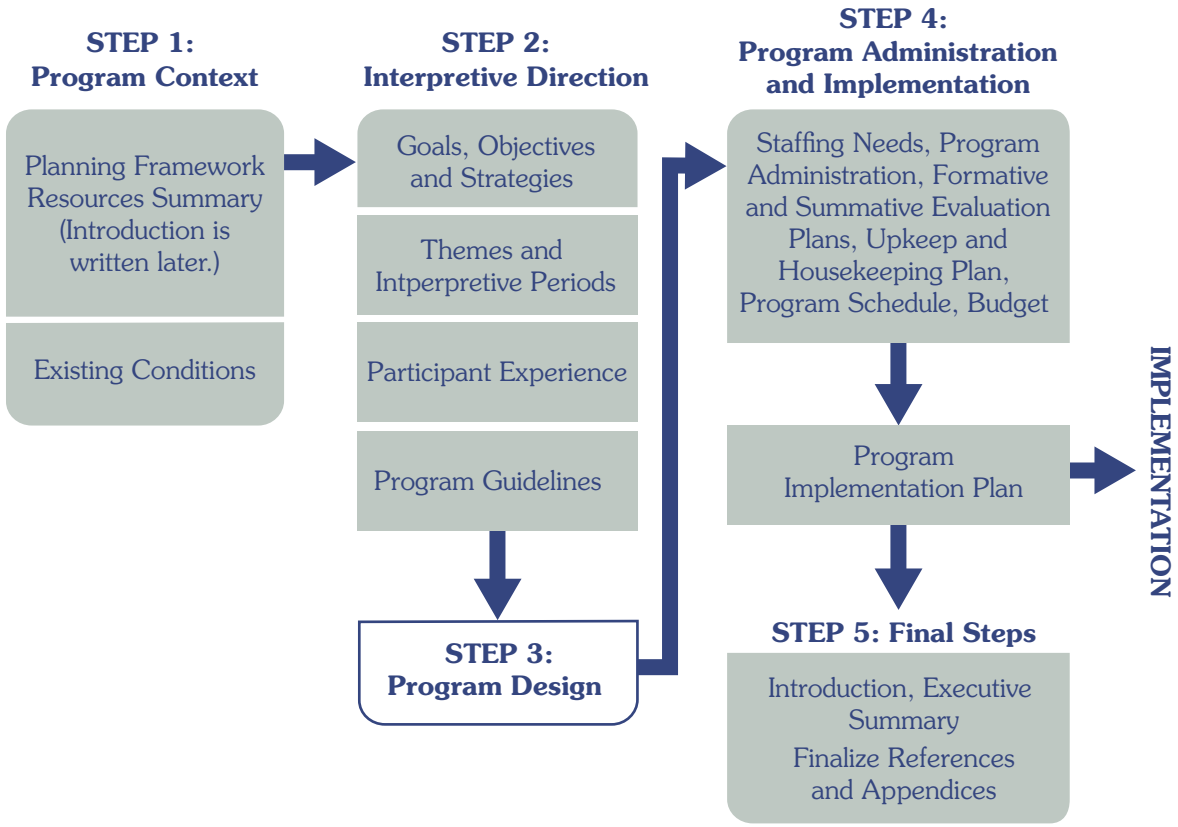
REFERENCES

APPENDICES

1. Detailed Resource Information
2. Detailed information on potential partners
3. Relevant Curriculum Standards
4. List of local schools, school districts and County Offices of Education
5. Detailed Tools List
6. Detailed Materials List
7. Detailed Staff List
8. Accessibility Standards
9. Visual Media Release Information
10. Visitor Research Summary

Suggested Steps to Writing an Interpretive Program Plan

Begin writing your Interpretive Program Plan with the Program Context. Follow with the Interpretive Direction, and then the Program Design and Implementation. As you work, keep the References and Appendices sections current. The last step is to complete the Executive Summary and Acknowledgements and finalize the introduction.



The Program Implementation Plan will be your "to-do list" for getting the program going. As you develop the Program Concepts and Program Administration sections, keep a list of any ideas that arise of tasks that will need to be accomplished before the program starts. This list will be the foundation of your Program Implementation Plan.

Writing an Interpretive Program Plan

Remember that your plan will not be like any other program plan. Some of the suggested content described below may not be relevant for the type of program you are planning. Adapt the suggested content to fit your program.

EXECUTIVE SUMMARY

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

See page 47 of *Chapter One: Success Starts Here* for information on writing the executive summary, acknowledgements and table of contents.

PROGRAM CONTEXT

If the park has an interpretation Master Plan, much of the Program Context content can be taken directly from, or summarized from, the IMP. More recent general plans are also good sources, as are other interpretive services plans for the park. Verify all resource information with appropriate resource specialists, to ensure it is accurate and in line with the most current research.

Chapter 1: Introduction

1.1 Park Overview

- Briefly describe the park for those who are not familiar with it.
  - Describe park's location (e.g. in the Sierra Nevada, 30 minutes outside Tahoe City).
  - Describe park's physical setting (e.g. desert, beach, urban, mountains)
  - Identify key attractions (e.g. historic building(s), natural features, recreational activities).
  - Include a map that shows the park's location in the general region and relative to nearby cities, other recreation sites and interpretive providers.
  - Include more specific site location map(s) showing key park features.
  - Explain when and how the park was acquired and classified.
  - Identify key events, people or groups that contributed to the park's history and/or significance (e.g. gold discovery, Spanish missionaries, CCC).

- › Quote your park's Sense of Place statement if included in the General Plan.

1.2 Program Overview

- Briefly describe the interpretive program being planned.
  - › Give the program type (e.g. historical skill demonstration, tour, Environmental Living Program)
  - › Give the program topic
  - › State whether this is an educational program
  - › Describe the target audience
  - › Explain why this program is being initiated at this time. (See "Why is this Plan Needed" checklist, page 211 for reasons to consider.)
- Describe major program elements and methods (e.g. hands-on activities, audiovisual content, extensive pre-program preparation).

1.3 Plan Purpose

- Identify the purpose of this plan—what will it achieve.
- Include any specific purposes for this particular plan, beyond those that apply to any program plan.
- Identify the intended lifespan of the plan (e.g., how long it will be used and/or when it should be updated).

1.4 Planning Process

- Briefly describe the process used.
- List the planning team members and their roles.
- Identify when planning started and finished.
- Summarize the process of public involvement (e.g. stakeholder meetings, surveys, interviews).

Chapter 2: Planning Framework

The Planning Framework describes any previously completed planning that will help set the direction of this project. It includes additional fundamental guidelines, such as national, state, or local designations, and mission and vision statements.

2.1 Existing Plans and Statutes

See the "Planning Documents Checklist," page 215, for ideas of plans and other documents to consider.

- If the park is a classified state park unit, restate its Declaration/Statement of Purpose.

- General Plans
  - › State if there is a General Plan.
  - › State which chapters of the General Plan are relevant to this project and summarize their contents.
- Interpretation Planning
  - › Identify any previous interpretation planning (e.g. IMP, Prospectus, other Interpretive Services Plans)
  - › Summarize their relevance to this project.
- Other Relevant Plans or Statutes
  - › Identify other relevant plans, reports or designations that could impact this project (e.g. marketing plan, historic landscape report, National Register of Historic Places).

2.2 Mission and Vision Statements

- Restate the California State Parks Mission: *"The Mission of California State Parks is to provide for the health, inspiration and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high-quality outdoor recreation."*
- Restate the California State Parks Interpretation Mission: *"Interpretation is a special form of communication that helps people understand, appreciate, and emotionally connect with the rich natural and cultural heritage preserved in parks. It is the mission of interpretation in California State Parks to convey messages that initially will help visitors value their experience, and that ultimately will foster a conservation ethic and promote a dedicated park constituency."*
- Restate the California State Parks Education Mission: *"The most powerful forms of education are meaningful, involve the student, promote critical thinking, and appeal to different learning styles. Our mission is to provide educational experiences both in California State Parks and in the classroom, assisting educators with curriculum needs and offering activities that enable students to investigate, research, and participate in interactive learning."*
- State the park's mission and vision for interpretation. These may be found in the park's Interpretation Master Plan or General Plan (if it was written after 2007). If the park does not have a mission or vision for interpretation, simply state this. The mission and vision for interpretation are not developed as part of an interpretive program or project plan; they should be developed as part of the General Plan or Interpretation Master Plan process when planners are taking a more holistic view of the park.

2.3 Interpretive Period(s)

If the program will include information on cultural resources, include this section in the plan.

- Restate the park's interpretive periods from the General Plan or IMP.
- Identify which periods are relevant to this interpretive program.
- If an interpretive period has not been previously identified, acknowledge this and describe the time period(s) this program will interpret.

Chapter 3: Resources Summary

This section is a brief summary of the significant park resources for interpretation. If the park has a post-2007 general plan, or has an Interpretation Master Plan, these may contain an Interpretive Significance statement that will list resources considered significant to interpret at the park. Older general plans and interpretive prospectuses will list topics significant for interpretation (sometimes called themes, though they are not full theme statements). If no higher-level interpretation planning exists for the park, identify significant resources by reviewing park resource information and consulting with resource specialists familiar with the park.

3.1 Cultural Resources

- Briefly describe the park's cultural resources (sites, structures, and human history) that are significant for interpretation.

3.2 Natural Resources

- Briefly describe the park's natural resources that are significant for interpretation.

3.3 Recreational Resources

- Briefly describe the park's recreational resources that are significant for interpretation.

3.4 Collections

The Collections subsection provides information on significant collections categories or important specific items available for research purposes, for possible exhibit in conjunction with a program, for hands-on use (see DOM 0900 for policies on objects for hands-on use) and for potential reproduction for program-reinforcing sales. A "Scope of Collections Statement" for the park is the best resource for researching this section. A general plan or IMP should also have information on collections. If none of these are available, consult with the park or district's collection manager. See page 16 in *Chapter One: Success Starts Here* for more information on collections.

- Briefly describe the park's museum collections.
- Briefly describe the park's interpretive collections.

Chapter 4: Existing Conditions—Inventory and Analysis

4.1 Existing Interpretation and Education Opportunities

- Park-provided: Describe other interpretation, both personal and non-personal, currently offered at the park. Include topics, media and methods, and target audiences.
- Regional: Describe other key interpretation and education opportunities in the region. Include description or map of region. See "Related Resources and Interpretation" checklist on page 218 for ideas of other providers to consider. You may include a detailed list of other interpretation and education providers and their programs in the appendices.

4.2 Operational Resources

- Give the current park staffing level for interpretation and education, plus volunteer docent numbers and availability.
- Infrastructure: Briefly list and describe facilities, trails and other physical areas currently available for interpretation. Include information on infrastructure that may impact or be impacted by your program, such as water and sewage systems, and parking availability.
- Funding: Identify the current funding levels and sources for park interpretation.

4.3 Partners

- Identify the park's current partners.
- Identify the role the park's cooperating association (if there is one) will have in the development and implementation of this program.
- Identify any concessions and what role, if any, they will have in this program or if their presence will impact any aspect of this program.
- Identify any need for donor or sponsor recognition. See page 6 in *Chapter One: Success Starts Here* for more on donor and sponsor recognition.

4.4. Stakeholders

- List internal stakeholders
- List external stakeholders
- Identify the role that stakeholders will play in the development and implementation of your project.

- Identify any need for donor or sponsor recognition. See page 6 in *Chapter One: Success Starts Here* for more on donor and sponsor recognition Identify any need for donor or sponsor recognition.

4.5 Site Considerations (for programs given at a specific site)

Document any program safety or security concerns.

- Identify any potential issues or considerations with the following at the program site:
  - Access (including transportation, language, and universal accessibility issues such as paths of travel, noisy environment or bad acoustics, and any hazards for people with low or no vision. See the "Limitations to Access" checklist on page 221 and "Universal Access or Other Alternatives" checklist on page 222 for other factors to consider.)
  - Seasonal considerations (e.g. weather, seasonal site or road closures)
  - Safety and Security (See the "Safety and Security" checklist, pages 226-227, for considerations.)
  - Sensitive natural/cultural resources

4.6 Audience/Visitor Assessment

4.6.1 Potential Program Participants

- Who might attend this program if it meets their needs? Include current park visitors who take part in on-site programs, current visitors who do not take part in on-site programs, participants in existing off-site programs, and potential audience members (e.g. area residents or nearby school classes) who may not visit the park or take part in off-site programs. Include both demographics and psychographics.

4.6.2 Target Audience

- Describe the target audience based on the audience assessment, department strategic initiatives, stakeholder input, and existing park and area interpretation.

4.6.3 Front-end evaluation

- Summarize target audience input on their interpretive or education program wants and needs. Describe data collection method(s) (phone survey, mailed written survey, in-park written survey, interviews, online survey, focus groups, stakeholder meetings . . .). Raw data such as survey questions and individual responses can be included in an appendix, if desired. See page 40 of *Chapter One: Success Starts Here* for more information on front-end evaluation.

Chapter 5: Summary of Analysis

The previous chapters are largely an inventory of what has been done before and what currently exists in your park. The analysis in chapter 4 is only on a topic-by-topic basis. In this chapter you will summarize the most important points of your previous analysis. You will also bring these separate elements together, along with previous planning, regulatory statutes, and the park resources, to see how they interact and will impact your program. As you conduct your analysis, some questions to ask yourself include:

- Where do visitor and potential visitor interests overlap with the natural, cultural and recreational resources?
- Are there unmet needs/desires of the visitors and of potential visitors?
- Are there topics that you should interpret at your park that may require special handling based on the visitors' existing knowledge and attitudes?
- Are the operational resources sufficient for the program that you are planning?
- Are the collections sufficient, or will we need additional acquisitions?
- Are there resource protection or safety issues that should be addressed?
- Are there stakeholders with whom you will need additional consultation?
- Will there be a need for donor or sponsor recognition in the final project? See page 6 in *Chapter One: Success Starts Here* for more on donor and sponsor recognition.
- Other?

A thorough and thoughtful analysis will set you on track to develop the next section, the Interpretive Direction. It should provide a logical link between what you have and the recommendations that you will make

INTERPRETIVE DIRECTION

Chapter 6: Program Goals, Objectives and Strategies

Developing program goals and measurable objectives is crucial in ensuring that you know what you want the program to achieve, and have a way to measure

whether it is achieving what you want. Strategies define how you plan to achieve the goals and objectives. For more on goals, objectives and strategies, see page 35 of *Chapter One: Success Starts Here*.

- List the goals for your program.
- List the objectives for your program.
- List the strategies for your program.

Chapter 7: Program Themes

These are the themes for your program, which are based on primary and secondary park themes identified in higher-level park interpretation planning (i.e. general plan, interpretive prospectus, or Interpretation Master Plan). For example, the unifying theme for your program may be a primary or secondary theme in the IMP. Document the relationship of program themes to the previously identified themes. If no higher-level interpretive planning exists for the park, develop program themes based on significant resources identified in the Program Context section. See "Articulating Interpretive Themes" on page 39 for more information on themes.

- Unifying Theme
- Primary Themes
  - Supporting Themes
- Secondary Themes
  - Supporting Themes

Chapter 8: Participant Experience

This is a general overview of the participant's experience before, during, and after the program. Don't go into program details until the Program Design section.

8.1 Program Participation Planning

- Describe what the program participant will experience and need as they plan their program participation.

8.2 Site Approach (if given at specific site)

- Describe how the visitor will approach the program site, and explain whether this will contribute to or detract from their program experience.

8.3 Program Experience

- Describe the visitor's overall experience during the program.

8.4 Potential Program-Reinforcing Sales

- Cooperating Association Sales
- Describe how both a sales area at near the program site and online sales could reinforce and extend the program experience.
- Concessions
- Describe how concessions sales could reinforce and extend the program experience.

8.5 Post-Program Experience

- Describe the visitor's overall experience after the program.

Chapter 9: Program Guidelines

9.1 Interpretive Recommendations

- Give the Recommended Program Structure and Methods (e.g. Guided Tour, Hands-on Activity Stations, Demonstrations, Living History). For suggested media and methods, see the "Selecting Media" checklist on page 231.
- Describe or list recommended supporting media (e.g. Audio Recordings, Photographs, Hands-on Objects, Artifact Reproductions).

9.2 Educational Recommendations (for K-12 School Programs)

- Target Grade(s): Indicate for which grades the program is designed.
- Target Content Standard: Indicate which educational content standards for the target grade(s) will be met by the program.
- Other educational requirements that will be addressed, such as content that reinforces the curriculum from the Education and the Environment Initiative. See the "K-12 Education Considerations" checklist, page 232, for other things to consider.

9.3 Accessibility

- Outline general accessibility concepts for the program. (Specific accessibility measures, including alternate experiences as needed for individual stops/stations, will be included below in the program outline.)

PROGRAM DESIGN

Chapter 10: Pre-program Preparation

- Include any required or recommended participant pre-program preparation.

Chapter 11: Site Plan

This section is only included for programs given at a specific site.

- Provide map or diagram of site, including approaches.

Chapter 12: Stop/Station Bubble Diagram or List

This section is only included for programs with multiple stops or stations (e.g. stops on a guided tour, demonstration or activity stations). See page 49 of *Chapter One: Success Starts Here* for more information on bubble diagrams.

- Assign each stop or station a reference number and name, and give these on a list or on a bubble diagram.
- Include arrows to indicate program flow, if structured with a set flow (e.g. a guided tour or ordered activities).

Chapter 13: Program Outline

13.1 Introduction

- Location reference number and name (if applicable)
- Include how main themes will be introduced
- Goals(s) and Objectives met
- Media or Method of Delivery
- Accessibility
  - › List measures that will be taken to for universal accessibility, and equivalent alternative experiences that will be provided if program or stop cannot be made universally accessible.

13.2 Body-For entire program body if not divided into stops/stations (e.g. talk, audiovisual presentation), or for each stop/station:

- Location reference number and name (if applicable)
- Topic
- Theme and sub-theme(s)
- Goals and Objectives met
- Media or Method of Delivery
- Accessibility
  - › List measures that will be taken to for universal accessibility, and equivalent alternative experiences that will be provided if program or stop cannot be made universally accessible.

13.3 Conclusion

- Goals(s) and Objectives met

- Include how main program themes will be reinforced.
- Media or Method of Delivery
- Accessibility
  - › List measures that will be taken to provide universal accessibility, and equivalent alternative experiences that will be offered if program or stop cannot be made universally accessible.

Chapter 14: Post-Program Reinforcement

- Include any recommended participant post-program activities
- Describe any take-home items the participant will create or be given during the program that reinforce program messages.
- Give details on recommended sales items to reinforce program messages.

PROGRAM ADMINISTRATION AND IMPLEMENTATION

Chapter 15: Staffing Needs

- Enumerate and give classification(s) of paid staff members needed to administer and present the program. (e.g. 2 Park Aids, 1 State Park Interpreter I) Describe any special qualifications staff members must possess, beyond the required qualifications for the classification. Indicate the amount of time each staff member will be needed per month when the program is fully implemented. If the program will only be presented during certain months of the year, indicate which months each classification will be needed. See the "Staffing Considerations" checklist on page 229 for a list of positions to consider.
- Enumerate the volunteers that will be needed to assist with administration and present the program. Describe any special qualifications needed.

Chapter 16: Program Administration

16.1 Publicity

- Outline how the program will be publicized.

16.2 Reservation Procedures (if program by reservation only)

- Tell how groups or individuals will make program reservations, and how staff will keep track of reservations.
- List and explain any reservation rules (e.g. first-come-first-served or lottery to reserve space in popular programs; cancellation fee, foul weather cancellation rules, number of participants per program, number of children per adult, how far in advance programs can be reserved)
- Describe reservation confirmation procedures, including when and how confirmation and any further information will be sent.

16.3 Teachers/Participants Packets (if applicable)

- Describe packet contents. As contents are developed, add to final "living document" as appendix.

16.4 Presenter Training

- Describe how paid staff and docents will be trained to present the program.

Determine and document how program presenters will be trained.

16.5 Teacher/Assistant Training (if applicable)

- Describe teacher/assistant training for program participants, if the program will include this element. (For example, ELPs and ESPs often require a teacher and parent/helper training before the program.) Include information on whether the training is required for participants, how participants will be trained, what materials they will receive, and any rules for training reservations, cost, and attendance.

Chapter 17: Formative Evaluation Plan

In this subsection you will describe the plan for testing whether the program meets its objectives before it is fully implemented (for example, trial runs of the program with groups that provide feedback). This formative evaluation will allow you to make changes in the program before additional money and time is invested in developing all of the program materials, training additional presenters, and buying large quantities of tools and materials. For more information on Formative Evaluation, see page 40 of *Chapter One: Success Starts Here*.

17.1 Evaluation Objectives

- Identify the objective(s) for which you will test. These should come from the objectives identified in the Interpretive Direction section.

17.2 Timeline

- Give an approximate timeline for testing, analysis, and follow-up.

17.3 Evaluation Method(s)

- Include quantitative and/or qualitative methods to be used.

17.4 Data Analysis

- Tell who will analyze the data, and how.

17.5 Formative Evaluation Follow-up and Use

- If the evaluation shows that the program does not meet some objectives, what is the plan for incorporating changes? Indicate whether there will be additional formative evaluation to re-test if objectives are being met after program modifications.

Chapter 18: Summative Evaluation Plan

Summative evaluation is an important part of reaching and maintaining program quality. The program Summative Evaluation evaluates both presenters' technique and program effectiveness in meeting objectives. Unlike exhibits, a program can be easily modified if it is not meeting objectives, and presenters can be coached. Consult the department's Aiming for Excellence handbook for presenter summative evaluation information and techniques. Also see page 40 of *Chapter One: Success Starts Here* for more information on Summative Evaluation.

18.1 Evaluation Objectives

- Include information on both objectives for individual presenters (e.g. they will meet RAPPORT standards) and program objectives from the Interpretive Direction section.

18.2 Timeline

- Indicate when each newly-trained presenter will be evaluated, and the frequency of evaluation thereafter. Also indicate when the meeting of overall program objectives will be evaluated on a regular basis.

18.3 Evaluation Method(s)

- Include quantitative or qualitative methods to be used, type(s) of evaluation

18.4 Data Analysis

- Who will analyze the data, and how.

18.5 Evaluation Follow-up and Use

- Include information on both follow-up with individual presenters and program modification based on overall evaluation results.

Chapter 19: Upkeep/Housekeeping Plan

- Describe when and how equipment, facilities, sites, and media used in the program

will be cleaned and maintained, and when and how program supplies will be replenished. Include special cleaning or maintenance instructions for specific items in the appendices.

Chapter 20: Proposed Program Schedule at Full Implementation

- Give the maximum number of times per day, number of days per week, number of weeks per month, and months of the year that programs will be offered when program plan is fully implemented and programs are running at full schedule.

Chapter 21: Budget

21.1 Direct Program Costs:

- Determine and document the estimated cost for each program.
- Give the cost per program of program tools. (Program tools are non-consumable, long life-span objects used in the program, such as LCD projectors, period clothing, field guides, binoculars, and hand tools.) Include the detailed list in the appendices.
- Give the cost per program of program materials. (Program materials are items that will be used up in the program (consumables), such as paper, coal, candle wax, cooking ingredients, and nails). Include the detailed list in the appendices.
- Give the total staff cost per program, including preparation, presentation, and cleanup. Include the cost of benefits, not just salary. Provide a detailed staff cost list in the appendices.

Setting up a CAMP Interpretation Job Plan is one way to determine direct program costs. As a bonus, the Job Plan will then streamline future CAMP program data entry.

Budget for eventual replacement of program tools that are worn out or lost.

21.2 Administration (including staff and material costs)

- Publicity
- Reservations
- Teachers/Participants Packets
- Evaluation costs
- Upkeep/maintenance of tools and program areas
- Stocking and preparation of materials

See "Program Budget" checklist on page 235 for items to consider including in your budget

- Volunteer management
- CAMP Interpretation data entry

Chapter 22: Donor and Sponsor Plan

22.1 Donor and Sponsor Solicitation

- Describe how donors and sponsors will be sought, and what type of donors are needed (e.g. financial, specific in-kind donation needs).

22.2 Donor and Sponsor Recognition

- Describe how donors and sponsors will be recognized for their contributions.

Chapter 23: Program Implementation Plan: May be matrix, in part or all

The program implementation plan is the to-do list for getting the program going on a regular basis. All or part of this section of the program plan may be formatted as a matrix or Gantt chart, with each row showing a task to be completed, the person(s) responsible, and when it will happen in relation to other tasks.

23.1 Tasks to implement program plan

- Identify tasks that must be done to get programs going on a regular basis (e.g. write teacher's guide, purchase hands-on objects, complete formative evaluation, train volunteers to deliver program, enter program job plan in CAMP, develop program reservation system). See Appendix E, Planning Checklists.

23.2 Proposed staff responsibilities for tasks

- Identify the responsible parties for each task, by name or position.

23.3 Proposed Implementation Timeline

- Give approximate time to complete each task, and indicate the order in which tasks must be done if some are dependent on other tasks being completed first.

REFERENCES

List selected references used in the planning process or valuable as background material. See page 16 of *Chapter One: Success Starts Here* for more information on compiling and formatting references.

APPENDICES

Include relevant background material in the appendices as you go through the planning process. Consider including any information that will be useful for potential funders or partners, future program administrators, presenters,

or participants to understand the plan and the program; but is too detailed to include in the main plan sections. The following are suggested categories of information to include:

1. **Detailed information on park natural and cultural resources, such as:**

- Plant and Animal Lists
- Detailed human history narrative
- Detailed information on cultural resources such as buildings and landscapes, especially if they are on the National Register of Historic Places

2. **Detailed information on potential partners**
3. **Text of relevant curriculum standards**
4. **List of local schools, school districts, and County Offices of Education**
5. **Detailed Tools List**

- List and/or describe all Program Tools (e.g. non-consumable, long life-span tools, clothing, hand-held objects, field guides) and the cost of each per program.

6. **Detailed Materials List**

- List and/or describe all Program Materials (consumables), and the cost of each per program.

The CAMP/Maximo database includes the cost per hour of use of some basic interpretation tools. For other tools, estimate the number of hours the tool will last, and then divide the initial cost by the number of hours to determine the cost per hour. Then multiply the cost per hour by the length of the program expressed in hours to get the cost per program.

7. **Detailed Staff List**

- List the classifications, number of hours, cost per hour, and total cost per program of Program Staff, including preparation, presentation, and cleanup. Cost per hour includes cost of benefits, not just salary.

8. **Relevant Accessibility Standards**
9. **Visual Media Release Information (for program publicity photos or video)**
10. **Visitor Research Summary**

Congratulations. Due to your thorough planning, a new program is born!

CHAPTER FOUR:

ANNUAL INTERPRETATION IMPLEMENTATION PLAN

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CHAPTER FOUR:

ANNUAL INTERPRETATION IMPLEMENTATION PLAN

The Annual Interpretation Implementation Plan (AIIP) is a versatile planning tool available to Districts to help give structure and direction to their overall interpretation program. AIIPs are tools to celebrate accomplishments, transport ideas into measurable actions, build consensus, and communicate and identify interpretive priorities and needs. As the name implies, the AIIP is prepared each year by District and park staff to identify short-term interpretive program objectives and set priorities for specific, measurable actions related to the interpretation program to be accomplished in the coming year. The District Interpretive Coordinator (DIC) coordinates and facilitates the planning process. Once developed, the plan is reviewed throughout the year to help ensure objectives are met. (DOM 0902.6.4)

The annual implementation plan can assist in the following:

- Encouraging park staff to develop funding requests with clear connections to the plan.
- Providing partners, funders, and cooperating associations with a clear picture of the park's interpretive objectives for the coming year, which aids in funding decisions.
- Improving coordination and support of interpretive activities among the park's Services and between parks.
- Increasing recognition of interpretation program accomplishments.
- Clearly prioritizing short-term interpretation program needs.

AIIPs are tools to celebrate accomplishments, transport ideas into measurable actions, build consensus, and communicate and identify interpretive priorities and needs.

4.1 RESEARCH FOR AN ANNUAL INTERPRETATION IMPLEMENTATION PLAN

Actions in the AIIP are based on strategies and tasks from the park's Interpretation Master Plan, entries in the Park Infrastructure Database (PID), and input from Interpreters, Rangers, Lifeguards, Maintenance staff, Resources staff, other specialists, active docents and other volunteers, and Cooperating Association representatives. It also updates progress on actions listed in the previous year's AIIP, if one was done. The process does not normally involve other stakeholders outside of State Parks and the cooperating association, though in some unusual situations it may be appropriate to involve them for special expertise or to achieve more "buy-in" for sensitive or controversial actions.

Following is a typical research phase:

- Determine the status of all actions listed on the previous year's AIIP.
- Create a list of all uncompleted interpretation-related PID listings for the park.
- Create a list of all uncompleted strategies and actions from the Interpretation Action Plan.
- Hold a workshop with park and district staff, cooperating association representatives, active volunteers and other key partners, and provide them with the above information. Solicit their input on prioritization of uncompleted PID projects, strategies and actions; responsibility for actions, and identification of other interpretation program needs.

4.2 PROJECTED TIMELINE AND KEY MILESTONES

Four months before plan completion: Workshop preparation and scheduling.

- DIC asks Supervisors to provide tentative dates for workshop to be held in two months.
- Before workshop, Supervisors review the current AIIP and note progress on listed actions.
- DIC provides workshop invitees with uncompleted IAP strategies and tasks, and relevant PID listings.

Two months before plan completion: AIIP Workshop and draft AIIP.

- Supervisors, staff, and specialists meet to review the current AIIP, IAP, and PID listings, and develop the plan for the coming year.
- Following the workshop, the DIC compiles the new draft AIIP

Six weeks before plan completion: New AIIP Review and Revision.

- DIC provides draft AIIP to Supervisors for review.
- With feedback from Supervisors, DIC revises plan as needed and forwards to District leadership for review and comment.
- DIC revises plan based on leadership input, and submits to District Superintendent for approval.

Plan completed: Plan distributed and actions initiated.

- DIC distributes the approved plan to Supervisors for implementation.
- DIC also sends the plan to cooperating association and other key partners.
- Over the following year, Supervisors, DIC, other specialists, the cooperating association, and other partners and funders will implement the plan.

4.3 CONTENTS OF AN ANNUAL INTERPRETATION IMPLEMENTATION PLAN

The Annual Interpretation Implementation Plan is a combination of lists, a narrative and a table of actions. The information included in an Annual Interpretation Implementation Plan and its level of detail will vary from plan to plan, depending on the park's interpretation and education program and resources. Suggested sections and their formats are indicated in the template below.

Annual Interpretation Implementation Plan Template

Section 1: Goals and objectives of the overall interpretive program

(List)

Section 2: Accomplishments from the current year.

(Matrix—see next page)

Section 3: Specific actions for the coming year.

(Matrix—see next page)

Section 4: Long-term projects

(Matrix—see next page)

Section 5: Cooperating Association support for the current year.

(Narrative)

Section 6: Significant natural, cultural and recreational resources and/or critical resource issues to be interpreted.

(List)

Section 7: Current and potential audiences.

(List)

Suggested Format for Matrix Sections of AIIP

<Year> Annual Interpretation Implementation Plan for _____ <District, Park(s), Sector, Subunit>

Action	Responsible	Comment	Target	Completed	PID Ref	Priority
<Interpretation Strategy or Task >	<Names of district staff members, or positions>	<Further information on action, staff, logistics, etc.>	<Target completion date>	<Actual completion date>	<PID number (if any)>	<H, M, L>

4.4 WRITING AN ANNUAL INTERPRETATION IMPLEMENTATION PLAN

Standard Sections:

Section 1: Goals and objectives of the overall interpretation and education program

- List long-range program goals and objectives. These may be quoted from an interpretation master plan or a previous AIIP, or developed new.

Section 2: Accomplishments from the current year

- Update the current year's matrix with accomplishments.
  - › Update comments column with significant factors that affected accomplishments, either positively or negatively, and any changes made to original action description.
  - › Update Completed column with date.

Section 3: Specific actions for the coming year

Fill in a row of the matrix for each action identified:

- Action
  - › Briefly describe action to be accomplished over next year.
- Responsible
  - › List personnel responsible for completing action, by name or position.
- Comment
  - › Describe action in more detail, if necessary, and add comments on factors affecting actions, steps to complete action, and other information that will be helpful when completing action.
- Target
  - › Give a target month and year for action completion. For some actions, the target may be a date range, or not applicable (N/A).
- Completed: This column is only used when updating the matrix.

- PID Reference
  - If applicable, list the PID project number connected with this action. The action may accomplish an entire PID project or a phase of a PID project.
- Priority
  - Indicate high, medium or low priority (H, M, L).

Section 4: Long-term projects

(Matrix—see next page)

Optional Additions:

Cooperating association, other partners and funding support for current year

- Describe how the funders and partners have supported park interpretation in the current year.

Significant natural, cultural and recreational resources and/or critical resource issues to be interpreted

- List the significant resources for interpretation, either as identified in past planning or develop new.

Current and potential audiences

- List current audiences using brief descriptions, such as "Campers, summer" and "Seniors, non-Californians, esp. from Pacific Northwest."
- List potential audiences that are not currently reached by park interpretation, especially target audiences.

Example AIIP

Following is an example of a completed AIIP, the 2009 Carpinteria State Beach plan. Remember that there is flexibility in the AIIP specifications, and your plan may include different data than this example plan.

2009 INTERPRETIVE PLAN

Carpinteria State Beach

"Carpinteria State Beach is a unique coastal community, rich in recreational, natural and historical resources."

--Primary Interpretive Theme for Carpinteria State Beach

CHANNEL COAST DISTRICT

CARPINTERIA STATE BEACH

Tim Lowe, Park Maintenance Supervisor
Scott Cramolini, Supervising State Park Ranger
Griff Hutton, Lifeguard Supervisor

The 2009 Annual Interpretation Implementation Plan for Carpinteria State Beach has been reviewed and approved.

_____ _____
District Superintendent Date

"Interpretation is a communication process that forges emotional and intellectual connections between the interests of the audience and the meanings inherent in the resource."

National Association for Interpretation

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GOAL OF THE INTERPRETIVE PROGRAM

The goal of the interpretive program in the Carpinteria units is to ensure that the public understands the significance and value of the natural, cultural and recreational resources—and our efforts to protect and enhance them—through education, interpretation and leadership.

OBJECTIVES

- Provide high-quality interpretive services.
- Integrate all of our interpretive services to maximize communication of our primary interpretive theme.
- Employ a comprehensive planning process to produce an annual interpretive plan.
- Offer ample opportunities to learn about the natural, cultural and recreational resources.
- Provide time to develop interpretive programs.
- Provide interpretive training.
- Provide 2 formal evaluations / interpreter / year.
- Inspect interpretive facilities annually; maintain to department standards.
- Each interpreter will develop a new interpretive program or significantly modify an existing program every other year.
- Programs presented to school groups will be aligned with appropriate state education content standards.
- All visitors are welcome; barriers to access are minimized.

PRIMARY INTERPRETIVE THEME

"Carpinteria State Beach is a unique coastal community, rich in recreational, natural and historical resources."

2009 ANNUAL INTERPRETATION IMPLEMENTATION PLAN FOR CARPINTERIA STATE BEACH

Action	Responsible	Comment	Target	Completed	PID Ref	Priority
Provide interpretive training 1. District-wide all-interpreter training 2. Camp Host training	Chapin, Wilson	8 hours / interpreter / year Wilson on planning team for Dist. workshop Wilson to determine best dates from Wills	04/09 6/09		n/a	H
Continue Guest Speaker program for campfires.	Wilson	Provide RAPPORT guidelines. Evaluate first presentation to determine if OK for return	10/09		n/a	M
Obtain approval for all new sales items for visitor center	Wills	Obtain lead-free certification from all vendors; submit to DIS for review.	9/09		n/a	H
Provide 2 evaluations per interpreter per year	Cramolini	Minimum: Self-evaluation and audience evaluations by all.	10/09		n/a	H
Provide program preparation time	Cramolini		12/09		n/a	H
Inspect interpretive facilities annually	Lowe, Wilson		12/09		n/a	H
Maintain interpretive facilities	Lowe		12/09		Need	H
Submit Friends budget requests to CAL	Cramolini	For 2009 funding	12/1/08			
Obtain funding for seasonal Interpreter	Cramolini	Friends budget request. Include spending plan.	1/09		Possible	H
Recruit, hire, train and supervise new PIS or similar for summer 2009.	Cramolini	Consider Sr. Park Aid if PIS positions are frozen.	5/09			H
Obtain audio-visual cart	Wilson	Locate sturdy A-V cart. Consider adding big tires to standard cart.	6/09		n/a	H
Convert to electronic 918	Chapin/Wilson	Interpretive Activity Data and Actuals	6/09		n/a	H
Evaluate need for Interpretive Camp Host	Cramolini, Wilson		10/09		n/a	H
Support Linden Play Area and Palm Ave.-to-Linden Ave. Trail projects	Cramolini, Lowe, Hutton	Provide input into development of interpretive panels.	12/09		Need	H
Conduct orientation to PID; evaluate existing interpretive projects in PID for currency, consider adding new projects	Chapin		6/09		n/a	M

2009 ANNUAL INTERPRETATION IMPLEMENTATION PLAN FOR CARPINTERIA STATE BEACH (Continued)

2009 Action	Responsibility	Comment	Target		PID Ref	Priority
Replace all interpretive shelters and panels.	Chapin, Cramolini, Lowe		5/09		8140	H
Conduct quarterly progress checks of Action Plan	Chapin, Cramolini		3/1/09 6/1/09 10/1/09		n/a	H
Present interpretive activity summary report at 2009 Interpretation Action Plan meeting.	Chapin		10/15/09			
Replace all interpretive shelters and panels.	Chapin, Lowe	State budget situation delayed program. Low-profile stands delivered in October '08. Remainder expected in Dec '08 or early '09	10/08		7890	H
Complete Interpretation Master Plan for unit.	Chapin, Cramolini, Mendez	IEP funds (Prop 84). Mendez SSC lead. Stakeholder workshop in late Jan/early Feb. Funds revert after 6/30/09.	6/09		164220	H
Maintain and increase if possible the number of interpretive activities presented in 2009.	Cramolini, Hutton	Campfires, Junior Rangers, Pre-Junior Rangers, school programs. Staff dependent	9/09			

2008 Interpretive Accomplishments

Action	Responsible	Comment	Target	Completed	PID Ref	Priority
Provide interpretive training 3. District-wide all-interpreter training	Chapin	8 hours / interpreter / year	04/08	4/16/08	n/a	H
Develop script with each new program	Chapin	NOT REQUIRED PER SAC.	6/08	n/a	n/a	M
Develop list of certified signers	Chapin	ADA. Not needed. Handle on as-need basis.	6/08	n/a	n/a	M
Continue Guest Speaker program	Wilson Wills	Chumash elder, raptor recovery group presented programs.	10/08	9/08	n/a	M
Obtain approval for all new sales items for visitor center	Wills	Obtain lead-free certification from all vendors; submit to Chapin.	5/08	8/08	n/a	H
Provide 2 evaluations per interpreter per year	Butzke	Minimum: Self-evaluation and/or audience evaluations by all.	10/08	No	n/a	H
Provide preparation time	Butzke		12/08	10/08	n/a	H
Brief supervisor and new interpreters on available interpretive resources	Chapin	Revise action to "Take inventory of interp supplies/resources on hand at park."	~~6/08~~ 12/08	No	n/a	H
Inspect interpretive facilities annually	Lowe, Butzke		12/08	11/08	n/a	H
Maintain interpretive facilities	Lowe		12/08	12/08	Need	H
Obtain funding for seasonal Interpreter	Butzke	Friends budget request. Funds not used because unable to hire PIS.	3/08	3/08	Possible	H
Obtain audio-visual equipment	Wilson	Video projector from district. Purchased laptop with Friends $ funding OK'd in 3/08. Still looking for sturdy A-V cart.	3/08 6/08	Partial 7/08	n/a	H
Convert to electronic 918	Chapin/Wills	Interpretive Activity Data and Actuals. Staffing issues.	6/08	No	n/a	H
Implement kayak program at Carpinteria.	Butzke	Will require staff training, certification; acquiring kayaks. Insufficient staffing.	9/08	No	n/a	M
Evaluate condition of campfire center systems (audio, electrical) and prepare recommendations for upgrade.	Butzke	See Long-term PID list. Staffing issues.	12/08	No	Need	M
Support Interpretive Camp Host	Butzke	Prior-year Host did not return. Regular Hosts utilized in interpretation program.	10/08	No	n/a	H

2008 Action	Responsibility	Comment	Target	Completed	PID Ref	Priority
Support Linden Play Area and Palm Ave.-to-Linden Ave. Trail projects	Butzke	Little progress relevant to field staff.	12/08	n/a	Need	H
Conduct orientation to PID; evaluate existing interpretive projects in PID for currency, consider adding new projects	Chapin		6/08	No	n/a	M
Conduct quarterly progress checks of Action Plan	Chapin, Butzke		3/1/08 6/1/08 10/1/08	4/08	n/a	H

LONG-TERM

Action	Responsible	Comment	Target	Completed	PID Ref	Priority
Develop visitor center plan	TBD	Building is in poor condition.	2010/2011		4610 164220	H
Implement visitor center plan	TBD	Building is in poor condition.	2011/2012		5180	H
Renovate Campfire Center	TBD		TBD		156860	M
Plan interpretive facility at Tar Pits	TBD		TBD		7910	L
Develop interpretive facility at Tar Pits	TBD		TBD		7921	L
Interpretive element of board walk in coastal dunes (day use)	TBD	Contingent on completion of boardwalk.	TBD		7900	L
Improve Junior Ranger Meeting Area	TBD		TBD		7920	M
Develop interpretive brochure	TBD		TBD		8080	L

SIGNIFICANT RESOURCES TO BE INTERPRETED AT CARPINTERIA STATE BEACH
(Partial list; 2 asterisks=high interpretive priority, 1 asterisk=moderate interpretive priority)

****TIDE POOLS** ****DUNES** ****ASPHALT** ****MARINE MAMMALS** ****CHUMASH**
****COASTAL EROSION**

***Marine pollution (as it affects natural resources)** ***Plankton** ***Water Quality** ***Waves, Tides, Ocean dynamics**
***Carpinteria history** ***Fossils, tar pits** ***Astronomy**
- Auto camp
- Cirque Del Mar building
- Historic dump in San Miguel

Sandy beach
Ocean
Asphalt mining
Grunion
Surfing
Fishing
- Surf perch status

Sharks
Birds
- Eagles
- Migration

Insects
- Monarch butterflies

Plants
- Natives
  - Kelp
- Introduced
- Ornamentals
- Invasives

Animals
- Urban
- Natives
  - Amphibians
  - Invertebrates
    - Mussels
    - Sand crabs

Park careers

AUDIENCES

Campers, summer
Campers, off-season
Families, groups, individuals, Europeans
Los Angeles metro
Seniors, non-Californians, especially from Oregon, Washington, Canada

Day Users
Local Carpinterians
Ethnic minorities
Teenagers
Families, groups, individuals
Non-locals
Families, groups, individuals

Students (Elementary, Secondary, College/University)
Internet users
Anglers
Surfers
Birders, other wildlife watchers, e.g., harbor seal observers

APPENDICES

APPENDIX A:

INTERPRETIVE TERMINOLOGY

Accessibility

Accessibility is "the combination of various elements in a building or outdoor area, which allows access, circulation and full use of the building, facilities and programs by a person with disabilities." To ensure compliance with the Americans with Disabilities Act (ADA) accessibility needs to be addressed in all levels of planning, including interpretive center design and development, interpretive programming, trail/pathway construction and maintenance, and exhibit designs. For more information about accessibility, refer to the California State Parks Accessibility Guidelines, 2009. (Definition from the California Building Code 202.A.)

Amphitheaters

Amphitheaters are outdoor seating areas that provide space for day or evening talks, workshops, demonstrations, audiovisual programs, dramatic productions, puppet shows, Junior Ranger Programs and special events.

Annual Interpretation Implementation Plan

The Annual Interpretation Implementation Plan is prepared by District and park staff to identify objectives of the interpretation program for the District and to set priorities for the coming year. Once developed, the plan is reviewed throughout the year to help ensure objectives are met.

Audiovisual Media

Audiovisual (AV) media are ideally presented by an interpreter with the active participation of the audience. AV presentations include movies, slide programs, PowerPoint, video programs (both interactive and passive) and audio messages. AV programs are well-suited for telling sequential stories and for providing overviews of park resources. They also may interpret inaccessible resources.

Bubble Diagram

A bubble diagram is a graphic representation of space organization used in the early stages of concept design. Labeled elliptical shapes (bubbles) represent different areas within the space design. If flow pattern is included on the diagram, it is indicated with arrows between and around bubbles. Bubble diagrams can also be used to represent different sections of a presentation and how they are connected in time; and different tour stops or activity stations and paths of travel between them.

Campfire Centers

A campfire center is a facility located near a campground with seating to accommodate anticipated audiences, facing a presentation area.

Campfires recall our deepest roots as social beings. They inspire the same feelings of warmth, security and conviviality our forebears may have experienced around the fire. Where campfire centers are a major focus in a state park, they require careful planning and design to best serve interpreters and park visitors. Campfire center design must consider layout, audiovisual equipment and the sound systems to be used, along with wiring, lighting and safety. Most centers have a projection screen, electricity and lighting. (DOM § 0905.7)

Campfire Programs

A tradition in California State Parks, the campfire program is an essential part of many park experiences. The comforting, relaxing and informal qualities of campfire programs make visitors receptive to ideas, particularly concerning the protection of nearby resources and of the world in general. Evening gatherings usually include announcements, group participation in songs or stories, and an interpretive presentation.

California Environmental Quality Act (CEQA)

The California Environmental Quality Act (CEQA) requires state and local public agencies to identify the environmental impacts of proposed discretionary activities or projects, determine if the impacts will be significant and identify alternatives and mitigation measures that will substantially reduce or eliminate significant impacts to the environment. Historical resources are considered part of the environment and are defined in Section 15064.5 of the CEQA Guidelines. (PRC Section 21000 et seq. Title 14, California Code of Regulations Section 1500 et. seq.)

Concept Design

This is one of the earliest stages in planning the layout of an exhibit, museum or interpretive center. It should include an approach that satisfies the interpretive goals and objectives for the project, based on the resources provided by the planner, as well as a visual representation (concept sketch) of what the final display will look like, usually including a pattern or scheme that serves as a guide for the final selection of specific objects, graphics and labels.

Concessions

A concession is a private business operating under contract in a state park unit that provides products, services and programs not normally provided by State employees. Such services are intended to enhance the recreational or educational experiences of park visitors. (DOM § 0908.5, and DOM 1900 Concessions and Reservations)

Cooperating Associations

Cooperating Associations are local charitable nonprofit organizations with which California State Parks has entered into formal agreements. These organizations are involved with one or more state parks and are committed to funding and supporting publications, programs, events and facilities that advance education and interpretation in California State Parks. Each park unit normally has only one cooperating association. (DOM § 0908.4)

Cultural Landscapes

A cultural landscape is defined by the National Park Service as "a geographic area, including both cultural and natural resources and the wildlife or domestic animals therein, associated with a historic event, activity, or person, or exhibiting other cultural or aesthetic values."

Jack London's ranch is an example of a cultural landscape.

Declaration of Purpose

The declaration of purpose (called Statement of Purpose for some parks) defines the purpose of the unit in the context of the State Park System and the broadest goals of management. It includes an identification of prime resources, a broad statement of management goals consistent with unit classification, and a general statement of appropriate recreational activities.

All classified units of the California State Park System have a Declaration (or Statement) of Purpose, established during the Naming and Classification process. The Declaration of Purpose is usually updated in newer General Plans. Check the most recent park general plan for the current Declaration of Purpose. If the park has no general plan, consult the Park Unit Purpose Statements list on the Planning Division's web page at http://www.parks.ca.gov/?page_id=797

Demographics

Demographics are measurable characteristics of a segment of the public at large; may be connected to the group's age, ethnicity, the region where the group resides, a particular recreational interest, economic status, etc. (Planning Handbook)

Demonstrations

Demonstrations are useful for presenting or showing skills or physical activities, either to teach them to participants or just as a matter of interest or information. They teach visitors new recreational skills, and show traditional activities and crafts that not only help visitors to step back into another time, but also bring them closer to other customs and cultures. Demonstrations may also involve the interpretation of natural resources and phenomena. (DOM § 0904.6.4.1)

Department Operations Manual

This manual is the basic policy document for the State Park System. The purpose of the *Department Operations Manual* (DOM) is to provide a single convenient source of approved policies and procedures which are pertinent to the operation of the State Park System. It is intended as a working guide for personnel in Park Operations, and as a reference document for all other departmental personnel.

DOM supersedes all previous related policy documents. Future policy modifications or changes may occur in the form of Departmental Notices or Chapter revisions. The policies, definitions, processes and procedures contained in this manual guide the management of the State Park System under the jurisdiction of the Department of Parks and Recreation, including its natural and cultural resources, their interpretation, provisions for public and employee safety and maintenance of facilities and equipment.

Policy direction in DOM may be general or specific. All Departmental policy is set forth in writing, approved and issued by the Department, and published or otherwise made available to those whom it affects and those who are entrusted with implementing the policy. Adherence to policy is mandatory unless waived or modified in writing by the Director or designee. Policy waivers and modifications will be considered on a case-by-case basis, and previous waivers or modifications should not necessarily be regarded as precedents for similar waivers or modifications. Unwritten or informal "policy" and various understandings of traditional practices must not be relied on as official policy.

Distance Learning

Distance learning is a field of education that focuses on the pedagogy, technology and instructional system designs that aim to deliver education to students who are not physically "on site" in a traditional classroom or campus. Distance learning has become a useful tool for parks and museums to reach audiences that would otherwise have no access to the educational programs and resources traditionally provided on-site. Distance

learning programs are delivered using online technology tools like videoconferencing.

Distance learning programs use online technology tools, such as videoconferencing.

Docents

Docents are a special group of highly trained volunteers who interpret the cultural, natural and recreational resources of State Parks to visitors. Each has had formalized training in a park's history, natural history, park purpose, themes, policies, procedures, facilities and good public communication skills. With their own unique and individual approaches, they provide an informed, scholarly foundation to interpretive programs.

DOM

See *Department Operations Manual*

Dramatic Presentations

A dramatic presentation on a formal stage or platform can be an effective medium for conveying historic information. The presentation can be one person playing the role of a historic personality who tells stories and converses with the audience, or it may be a multi-person stage presentation, re-creating a historic incident. Dramatic presentations can be used to convey natural resource and resource protection information.

Environmental Impact Report

The Environmental Impact Report (EIR), required by CEQA, assesses all the environmental characteristics of an area and determines what effects or impacts will result if the area is altered or disturbed by a proposed action. If a proposed activity may result in a significant adverse effect on the environment, an EIR must be prepared.

Environmental Living Programs

Environmental Living Programs (ELPs) provide children overnight park experiences that explore the interaction between people and their environment. Students are immersed in the past through a structured program that incorporates demonstrations, hands-on activities and follow-up student assignments, all coordinated with concepts taught in the classroom. ELPs differ from standard tours and programs in their in-depth nature, their length and their immersion of the children in the subject matter being discussed. (DOM § 0904.6.16.2.1)

Environmental Studies Programs

Environmental Studies Programs (ESPs) have similar goals to ELPs but are organized without the overnight stay.

ELPs and ESPs explore the interaction between people and their environment. Hands-on activities reinforce learning.

Exhibit Vans or Trailers

Vans and trailers can be developed as mobile interpretive centers to take to schools, shopping centers and special events. They may focus attention on particular aspects of the park or on specific themes. Mobile exhibits can become part of a park's outreach program for underserved populations, who for various reasons may not be able to come to the park. They may also be developed to entice more visitors to the park. Mobile exhibits can be useful in districts where numbers of relatively small units, having similar resources, do not justify the development of a large, permanent interpretive center.

Feasibility Study

A study on the feasibility of producing an interpretive project or beginning a fundraising campaign should outline its possibilities, limitations and constraints. Feasibility will depend upon the availability of resources, budget, timetable, location, concept and possibly collections.

Formal Exhibits

Formal exhibits are interpretive media in which historical or natural history objects are displayed apart from their original contexts, using display cabinets and other contemporary furniture, along with illustrative graphics and text. They impart messages relative to certain themes. Formal exhibits can also be interpretive panels (without objects) illustrating an event, activity, site or people. They are versatile and can utilize many media: encased objects, natural history dioramas, models, murals, historic setting museums and vignettes, three-dimensional maps, text and graphics panels, video monitors and audio tracks, to name a few.

Exhibits displaying cultural and natural history objects related to the resources of a unit may be shown in the controlled environments of an interpretive center or museum. Objects that characterize or portray a park theme can enhance interest, convey complex ideas, and transcend barriers of culture and language. Historically significant objects bring authenticity and "presence" to the interpretation of a historic site.

Exhibits may also be located in a natural setting, such as outdoor trailside panels. They offer flexibility and convenience for visitors who may not have the time to take a guided natural history walk or historic tour, or to see a living history program.

General Plan

The general plan is the primary management document for each unit of the California State Park System, defining a park's primary purpose and establishing a management direction for its future development and operation. By providing a clear purpose and vision, guidance on long and short-term goals, and guidelines, the general plan defines the broadest management framework possible for a unit's development, ongoing management, interpretive programming and public use.

By law the State Park and Recreation Commission has the authority to review and approve General Plans of the State Park System. As land planning documents, they are subject to review under the California Environmental Quality Act (CEQA).

Goals

Goals build off the vision and mission statements. Goals are broad, general concepts that describe the ultimate purpose, aim or intent of your interpretation.

Goals are not necessarily measurable. They are the big picture, the overall results that interpretation should achieve.

Goals are often found in unit General Plans. When this is the case, they are restated and possibly updated and expanded in an Interpretation Master Plan. If goals are not outlined in General Plans, then they must be developed during the Interpretation Master Plan process.

Guided Walks and Tours

Guided hikes, walks, talks and tours bring together skilled interpreters with interested visitors. They make the fullest use of the resources at hand, whether they include flora and fauna, geographic features, historic buildings or artifacts, or a site where an important event occurred. As a general rule, walks and hikes are conducted in natural settings and tours at historic or other cultural sites.

Guided walks and tours make the fullest use of the resources at hand.

Guidelines

Guidelines are found in some units' General Plans or Prospectuses. In the General Plans, the role of the guidelines is to provide direction for accomplishing goals. If present, guidelines can be used to help develop goals, objectives and strategies for Interpretation Master Plans.

Hands-On Exhibits and Discovery Areas

Hands-on and discovery areas offer participatory exhibits developed especially for visitors to handle, examine or otherwise explore objects related to the park's resources and themes.

Exhibits can be composed of hands-on natural or cultural objects, models, discovery boxes, photographic enlargements, interactive games, flip-books, interactive videos and computer programs, environmental monitors (e.g. weather, tides, earthquakes), microscopes, and live animals and plants. These types of exhibits have particular appeal to children, who enjoy playacting, experimentation and touch.

Staffing requirements and maintenance costs can be high for discovery areas. Consult a Museum Curator or Superintendent before using museum objects in hands-on exhibits or discovery areas. If possible, modern substitutions for museum objects should be obtained and used. (For more information on extended hands-on use of museum objects see DOM § 2010.10.3 and 2010.10.4)

Historical Resources

Historical resources are identified Cultural Resource Properties, including recognized buildings, structures, sites, landscapes or archaeological resources that are eligible or potentially eligible for listing on historical registers. In California State Parks these properties receive appropriate management to ensure their preservation and stewardship as directed per departmental policies and environmental laws such as CEQA and California Public Resources Code 5024 et al.

Historic Landscapes

Historic landscapes are historic resource properties that generally include contributing features and elements more than buildings or structures. These properties can contain buildings, but may include any of the following character-defining features: natural or man-made topography, vegetation, circulation and/or water features, structures, site furnishings and/or objects that are contributors. Preserved, reconstructed and restored historic landscapes or individual landscape features provide valuable, three-dimensional contexts for interpreting the lifestyle, technology, economy, society and personalities of a particular historic period. Historic landscapes are divided into two categories: Historic Designed Landscape and Historic Vernacular Landscape.

A Historic Designed Landscape was consciously designed or laid out by an architect, master gardener or horticulturist in a recognized style or tradition. Aesthetic values play a significant role in designed landscapes.

Historic Vernacular Landscapes were shaped by the activities or occupancy of an individual, family or community. The landscape reflects the physical, biological and cultural character of those everyday lives. Function plays a significant role in vernacular landscapes.

Historic Reproductions

Reproductions are objects specifically created to duplicate historic objects. Two classes of historic reproductions exist. "Custom historic reproductions" are objects carefully replicated, based upon research pertaining directly to a specific site. "Mass-produced historical reproductions" are copies of period-style objects manufactured for general retail distribution.

Historic Setting Museums

Historic setting museums (also called house museums) are of two basic types: formal and adaptive. Formal historic setting museums are static—visitors view the exhibits from behind barriers. Usually the objects in these exhibits are original to the site or are artifacts of the same period.

In an adaptive historic setting museum, visitors may be encouraged to move through the space. In addition, objects are not generally parts of collections, and as such may be touched and/or used for their original purposes. Adaptive historic setting museums are typically used by living history re-enactors or demonstrators to portray a site, event or activity. The furnishings in an adaptive house museum are replicas or reproductions, expected to wear out through use and eventually to be replaced.

Historic Setting Vignettes

Historic setting vignettes are displays developed to re-create parts of rooms or historic areas. They are usually part of a set of exhibits, and can be either formal or adaptive.

Historic Site

A historic site is a landscape significant for its association with a historic event, activity or person.

Historic Structures

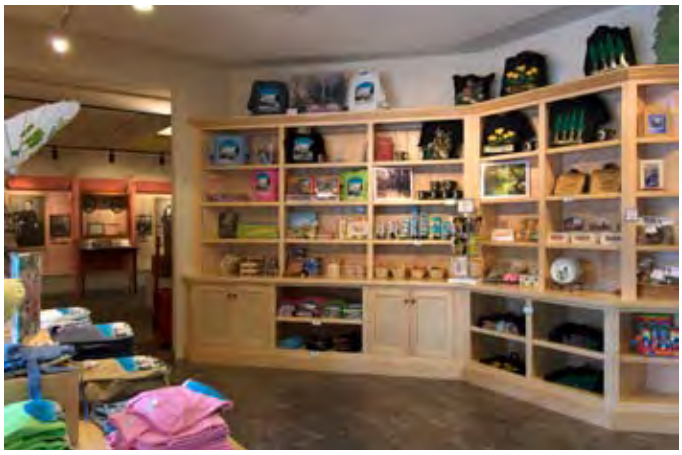
Historic structures are original, preserved, restored or reconstructed edifices of a particular period. Most historic structures are recognized as historical resources and require special management, including guidelines for their long-term preservation. In California State Parks they are often given adaptive park uses such as historic setting museums (house museums), visitor centers, museums, interpretive centers, concessions, park offices and/or storage.

Indoor Audiovisual Facilities

An audiovisual facility provides a comfortable, preferably darkened, space for presenting movies, video and multi-media programs. Theaters can be designed as multi-purpose facilities for lectures and special events. Their relatively high cost and the need for trained staff to operate and maintain audiovisual equipment can be expensive.

Information and Interpretive Sales Areas

Most visitor centers and interpretive centers include an information and/or sales area. These areas provide a needed public service consistent with the park's general plan and purpose. Materials sold or given away at visitor information/sales areas must have a connection to the park unit's values and resources, interpretive themes or visitor needs.



Interpretive Sales Area merchandise must have a connection to the park unit's values and resources, interpretive themes or visitor needs.

Sales area in parks may be operated in one of three ways: by the Department, by a concessionaire, or by the Department in conjunction with a cooperating association. Materials sold at visitor information/sales areas must be approved by the district superintendent or his designee. (DOM §: 0909.1)

Information Centers, Visitor Contact Counters, Kiosks

Information centers, visitor contact counters and kiosks are staffed facilities essentially developed to provide information. Often they are the first stop in the park for visitors. Park admission, maps and brochures are generally obtained there. Some also contain a few interpretive exhibits, a telephone and limited sales. Visitor contact counters are often located within large park visitor centers and museums.

Intellectual Property

Intellectual Property is creative ideas and expressions of the human mind that have commercial value and receive the legal protection of a property right. The major legal mechanisms for protecting intellectual property rights are copyrights, patents and trademarks. Intellectual property rights enable owners to select who may access and use their property and protect it from unauthorized use. For more information about intellectual property rights, see the Department's Intellectual Property Handbook. (DOM § 0907)

Interpretation

Interpretation is a mission-based communication process that forges emotional and intellectual connections between the interests of the audience and the meanings inherent in the resource. (National Association for Interpretation definition)

Interpretation Action Plan

The Interpretation Action Plan is a "roadmap," offering a realistic and flexible mechanism for achieving the park unit's interpretive goals, objectives and strategies. An Interpretation Action Plan should follow the development of a Master Plan and may be set up as a stand-alone document.

Interpretation Management Plan

An Interpretation Management Plan more specifically defines the objectives, methodologies and concepts for how goals and guidelines identified in the General Plan, will be achieved. The types of Interpretation Management Plans include Interpretation Master Plans and Action Plans. (DOM § 0902.6.3.1)

Interpretation Master Plan

An Interpretation Master Plan takes a long-range approach to interpretation planning and may be developed for a unit, sector or geographical region, or may be used for particular resources found throughout the state. It updates and expands upon the General Plan. The Master Plan provides greater background and context, while analyzing existing conditions and looking at opportunities and constraints for expanding interpretation and meeting visitor needs. The Master Plan can be a stand-alone document or combined with an Action Plan. (DOM § 0902.6.3.2.1)

Interpretive Activities

Live interpretation, or personal services, activities provide a direct interaction between a ranger, docent or other staff and the park visitor. Ranger- or docent-led activities can include: walks, tours, talks, demonstrations, campfire programs, dramatic presentations, Junior Ranger programs, puppet shows, living history programs, environmental living

programs, environmental studies programs, touch tables, interactive computer programs, outreach programs and other activities such as interpretive concessions. These personal services are effective interpretive media because they allow visitors to participate and interact, permitting immediate responses to what is actually occurring at that moment and place. Other self-guided interpretive activities include: historic setting museums and vignettes, historic landscapes, formal exhibits, outdoor exhibit panels, models, audiovisual programs and brochures offering interpretive information.

Interpretive Collections

Interpretive collections comprise objects that contribute to the sense of place. These may include items that are original to a site, accurate period objects or modern reproductions, or objects that otherwise support various interpretive themes.

Objects that may be touched, smelled or used for their intended purpose have long remained a dependable part of the interpreter's toolkit. Hand-held objects reach out to all the senses and span the range of abilities and learning styles. However, many museum objects are extremely fragile and repeated handling can lead to damage or loss. High quality reproductions or commonly available pieces are always the preferred alternative for regular hands-on use. Decisions regarding the proposed use of collections should be made by the District Superintendent in consultation with interpretive and curatorial staff. (For more information see DOM § 0904.7.1 and 2010.10.3)

Interpretive Concessions

Some park concessions, by contract, not only produce revenue, but also assist the Department in its interpretive efforts through their activities and, often within historic units, their period appropriate appearance. Under State Park Commission Policy 1.4, interpretive concessions must "directly relate to an interpretive theme, interpretive plan or general plan for that unit." Interpretive concessions may invite visitor involvement as well as offer lasting mementos of the park experience. The primary sources of revenue for an interpretive concession should be derived from products or services that are in themselves interpretive or representative of the natural, cultural or recreational resources of the park. (Refer to DOM 1900, Concessions and Reservations, as well as the Concessions, Reservations and Fees Division of California State Parks, for more information and specific policies concerning state park concessions.)

Interpretive Facilities

Interpretive facilities include interpretive installations such as exhibits, panels and non-presented audiovisual programs. Interpretive facilities sometimes referred to under the broad category of "non-personal interpretation," contribute to the overall visitor experience and further understanding of the park's resources. They also invite further exploration and encourage visitors' safe enjoyment of the park.

Interpretive Services Plans

Interpretive facilities contribute to visitors' further understanding of park resources.

Interpretive Services Plans make detailed recommendations for producing formal exhibits, furnishing historic settings, creating audiovisual media, developing trails and wayside exhibits, or producing such interpretive programs as living history or environmental living activities. Interpretive Services Plans take their direction from the park unit's General Plan and Interpretation Management Plans. Interpretive Services Plans fall into two categories: Interpretive Project Plan and Interpretive Program Plan.

Interpretive Project Plans include, but are not limited to Exhibit Plans, Furnishing Plans, Audiovisual Plans and Interpretive Trail Plans.

Interpretive Program Plans include Living History Plans, Environmental Studies and Environmental Living Plans. (DOM § 0902.6.5.1)

Interpretive Prospectuses

A provisional document, the Interpretive Prospectus contains the same interpretation information as a General Plan and evaluates existing conditions for interpretation in the park unit. An Interpretive Prospectus may be developed when there is no approved General Plan for a park unit or the approved General Plan does not contain sufficient detail to adequately guide the development of interpretive services for a unit. (DOM § 0902.6.2.2.1)

Interpretive Theme

An interpretive theme is a succinct, central message, phrased in the form of a complete sentence, about a topic of interest that a communicator wants to get across to an audience. (DOM § 0902.4.1)

Interpretive Trails

Blending interpretation with recreation, interpretive trails are a cost-effective way of reaching a large number of visitors and offering them opportunities to explore. Interpretation on trails may take many forms but generally falls within two categories—personal (interpreter-led walks, roving interpretation) and self-guided (publications, trail signs, markers, audio tours). It is important to note that any trail may be interpretive, even if it was not originally designated or designed for this purpose. (DOM § 0905.6.1)

Junior Lifeguard Programs

The "Junior Lifeguard" Program emphasizes teamwork, leadership and aquatic safety while introducing young people to safe marine and aquatic recreation opportunities. The program is designed to provide quality water safety education while improving young people's physical conditioning, their understanding and respect for the environment, and their respect for themselves, their parents and their peers. Youths between the ages of 8 and 15 of all abilities and skill levels may participate. (For more information, see DOM 1200 Aquatics)

Junior Ranger Programs

"Junior Rangers" is a statewide interpretive program designed for children, ages 7 to 12 years. The program fosters appreciation for California's rich natural and cultural heritage, emphasizing the stewardship of park resources and their connection to global issues. Children typically earn awards by taking part in activities presented by park staff, but youths may also participate via the Internet or by completing the Junior Ranger Adventure Guide. For more information, see the Department's *Junior Ranger Program Handbook.*

Litter-Getters

"Litter-Getters" is a statewide environmental education program that encourages young park visitors to decrease litter by reducing, reusing and recycling. The program informs visitors about the importance of reducing and reusing, the impact it has on parks and communities, and the role that recycling can play in improving the quality of life. Participating children are given engaging program materials, including a trash bag. Through the program, they earn prizes by collecting and disposing of park litter.

Living History Programs

Interpretive programming that includes presentation of authentic historical activities, events and persons or characters, using period-appropriate attire, objects and/or settings to help animate historical occurrences or events. The goal is to relate the past in a way that personalizes and humanizes it for visitors for a memorable educational experience.

Historic-style clothing and tools must be as accurate as possible for living history programs.

First-person living history interpreters immerse themselves to portray the attitudes, beliefs, viewpoints, language and mannerisms of a

particular era. Third-person interpretation, which is the recommended type of living history program for the Department, uses the same information, but communicates it through a modern-day perspective. Planning, meticulous research, training and preparation are critical to a program's success. (DOM § 0900.3.5.1 and 0904.6.12.1)

Historic-style clothing and tools must be as accurate as possible for these programs—down to the choice of fabrics, methods of construction and accessories. Replica period clothing, accessories, tools and other materials used for interpretive activities should be acquired, maintained and stored securely in a designated location within the park for staff involved in ongoing living history programs.

Mission Statement

A mission statement describes what an organization, or in this case, interpretation of resources, does every day.

A good mission statement inspires and provides focus and direction. It should clearly articulate why your park's interpretive programs exist. Mission statements should include sufficient description to clearly separate the mission of your program from that of others. At the same time, the best mission statements are succinct and memorable enough that they can serve to guide people's day-to-day actions.

Modern Equivalent Objects

There are a number of objects that are manufactured today with the same appearance and function as their historic counterparts. Some cast iron skillets, dishes, carpentry or gardening hand tools and bolts of cloth fall into this category.

Museums

According to the definition set by the American Association of Museums: a museum is an organized and permanent nonprofit institution, essentially educational or aesthetic in purpose, with a professional staff, which owns and/or utilizes tangible objects, cares for them, and exhibits them to the public on some regular schedule.

Museum Collections

Museum Collections are the objects (usually unique) that form the core of a museum's activities for exhibitions, education and research. This is understood to be different from a museum's archives or library, where the contents may be document based, replaceable and less exhibition-oriented. Museum collections must be catalogued into a database for ease of access and resource-tracking purposes.

Non-Personal Interpretation

Non-personal interpretation is interpretive media available to visitors to use without the presence of staff. Non-personal services can include brochures, exhibits, waysides, signs, videos and audio programs.

Objectives

Objectives are specific, realistic and measurable results that interpretation will achieve and that contribute to the accomplishment of a goal.

Objectives for an Interpretation Master Plan are developed from the Interpretation Master Plan goals, and should be restated in the Interpretation Action Plan. Guidelines outlined in the unit General Plan should be consulted as well when developing objectives.

Original Objects

Any historical items that can be documented as having actually been associated with a historic property (e.g. site, structure, landscape) or individual during a particular period are considered original objects. These items can include such items as furniture, paintings, china, machinery, farm equipment, tools, or more ephemeral items like letters or archival materials. Original objects tell a story and establish authenticity. There are two categories of original objects: (1) Those that are, in fact, the object with a known historical location or provenance; and (2) Those that are from the structure or owned by the historical owners of the property, and are the correct type and style, but are not necessarily used in their historical locations. Original objects should generally be catalogued into the department's museum collections. (For more information on museum objects, see DOM Chapter 2000)

Outdoor/Wayside Panel Exhibits

Outdoor or wayside panel exhibits offer general orientation and introductory information on prominent park features and sites, encouraging visitors to learn about and explore the area. Wayside exhibits are generally two-dimensional, containing text and graphics, but may also incorporate objects. Outdoor exhibits interpret resources

Outdoor wayside exhibits are always available. Panels can be changed for variety or seasonal messages.

in the immediate vicinity or may be displayed off-site to encourage travel to the area. They have the advantages of always being available, being relatively inexpensive, and allowing visitors to view them at their own pace. Their disadvantages include vulnerability to vandalism, the static nature of panel interpretation, and the visual impact of exhibit structures on the natural and historic views.

Outreach Programs

Off-site "outreach" programs can extend park interpretation into local communities. These programs enable professional staff and docents to share their interests, skills and knowledge with those sectors of the community that are unable or have yet to come to park sites. Outreach programs can take many forms—workshops, classes, talks, audiovisual programs, demonstrations—and are shaped for each group's needs. Older adults, people with disabilities and school children make ideal audiences for off-site interpretive programs. Also, presentations made to local service groups help to build community support for park programs.

Parks Online Resources for Teachers and Students (PORTS) program

This statewide interpretive program is a cooperative venture between public schools and California State Parks. The program uses California's K-12 High Speed Network to bring a series of academic content standards-based Units of Study from parks into classrooms throughout the state. The PORTS website provides teachers and students with resources necessary to participate in a series of lessons that use parks to address various academic standards. These resources include lesson plans, digital images, digital video, historic documents and other items. Each Unit of Study also contains at least one live, two-way videoconference between the park and the classroom where the park interpreter speaks directly with the students.

The PORTS program is highly dependent on a myriad of partnerships involving various Department and public education entities. A great deal of communication, coordination and management is necessary to ensure all partners' needs are met and the quality and consistency of the program is maintained. (DOM § 0904.6.16.3.1)

Park Infrastructure Database (PID)

The Park Infrastructure Database (PID), a tool developed to identify unfunded plans and projects and track their status, is used for budgeting, planning and implementing projects throughout the Department. Identifying interpretive plans and projects within PID will allow for the identification and the timely replacement of interpretive exhibits, campfire centers, interpretive shelters and other facilities as funding becomes available. (DOM § 0902.7.1)

Partners

Partners are individuals or entities working with state parks to help increase program offerings and to facilitate park improvements. California State Parks recognizes many partners, including, but not limited to, individuals and groups of volunteers, cooperating associations, concessionaires, businesses, corporations and foundations, nonprofit organizations and other government agencies.

Period Objects

Any historic objects dating to a specific period, but with no known connection to a particular structure, are considered period objects. Their use in a historic structure can be justified by known or inferred similarities to original furnishings. Often, transient, ephemeral items—posters, newspapers, toothbrushes, soap, commercially packaged goods, etc.—may no longer exist for a certain structure, but can be documented to the period. Use of these objects can help to create a more complete historic environment in historic setting museums.

Period Participatory Activities

When visitors participate in recreating the past, history comes to life for them. People will remember their visit to this unit well after their departure because of their own personal involvement in re-creating the historic scene. Participatory activities occur in adaptive house museum spaces and outdoor sites, where they are compatible with and appropriate to the historic setting and the interpretive period. Participation methods include hands-on interactive learning experiences and role playing.

Personal Interpretation

Personal interpretation involves an interpreter interacting with visitors through face-to-face contact. Personal services include walks, talks, demonstrations, children's programs, roving, campfire talks and providing information at the front desk. Personal interpretation is given in a linear fashion with the interpreter controlling the order of the information presented to the public.

Psychographics

Psychographics are not often distinguished from "demographics." However, demographics tend to focus on hard facts (e.g. age, gender, income), but psychographics provide a more descriptive assessment of visitors such as their attitudes, beliefs, values, motivations and opinions.

Primary Theme

Primary themes define the most essential ideas of the unifying theme to tell a complete story.

Props

A prop is a program aid, usually a replica or replacement object, that is used to offer tangible and sensory support for an interpretive program's theme.

Publications

Publications are portable media that can range from brief overviews to in-depth examinations of a park's resources. Publications include: brochures, booklets, books, announcements, advertisements, park maps, campground maps, plans, technical reports, teacher materials and newsletters, as well as electronic versions of such publications.

Publications can be used in various ways. They may be printed in several languages for foreign visitors, or produced in large print to aid visitors with visual impairments. Publications may also be sold as souvenirs, or developed as a source of revenue. (DOM § 0906.2.1)

Puppet Programs

Shadow puppets, string-and-rod puppets, marionettes and hand puppets have been used for thousands of years to entertain and educate, and to comment on society and politics. Through stories, songs, improvised dialogues and jokes, live puppetry can engage and focus the attention, imagination and emotions of audiences around important interpretive concepts. These programs are an excellent way of communicating resource information and values to children and adults alike. They can be employed to help individuals see critical issues from a variety of perspectives, as well as to better appreciate the world around them.

RAPPORT

RAPPORT is an acronym used to convey the key elements of quality interpretation: Relevant, Accurate, Provocative, Programmatically accessible, Organized, Retained and Thematic. (DOM § 0900.3.2.1) It is used on the three evaluation forms developed as part of California State Parks' *Aiming for Excellence* evaluation handbook: the Standard RAPPORT Evaluation (DPR 461), Visitor RAPPORT Survey (DPR 461A), and Self-Evaluation of Interpretative Program (DPR 461D).

Reference Library and Archives

A reference library and archives can provide a ready source of information and graphics for park staff, volunteers, researchers and concessionaires. This is essential for the accurate presentation, ongoing development, and refinement of interpretive programs. Park reference libraries and resource centers should include: copies of relevant photographs; basic historical works on the area and California; resource works on period attire, historic trades and businesses (where appropriate); natural history references,

relevant periodicals; Department of Education frameworks; teachers guides; and resource management references. The library and archives should have: appropriate storage, environmental controls, security and controlled access.

By definition, archives are non-circulating institutions and all materials will be used on-site and not removed. Park archives that include rare or fragile documentary materials must be located and securely stored with the necessary environmental and access controls. The materials should be managed by individuals trained in appropriate archival methods.

Reference Number

A unique number is assigned to each interpretive object in a Furnishing Plan or an Interpretive Plan. The number is used to identify the object on various historic setting museum documents, such as inventories and acquisition lists. It is also used on purchase documents to verify an object's purchase. The number itself usually consists of a location number and a number assigned to the object. For example, object number ten located in room one would be written 1-10.

Reproduction Object

A reproduction object is a currently manufactured duplicate of a historical object, either mass-produced or custom made, as it appeared at a specified point in time.

Roving Interpretation

Roving interpretation involves park personnel, specifically assigned to interpretive duty, mingling with the public. Contacts may range from brief presentations to spontaneous interpretive responses to questions asked. Roving interpretation can be a very cost-effective method of providing interpretive services to visitors who may have limited time available and cannot or do not want to participate in a formal program.

Schematic Designs

The goal of Schematic Design is to flesh out the scope and character of the future exhibit or interpretive program. This enables all parties involved to confirm themes and interpretation goals, and to review spatial arrangements, appearance, artifact use, materials and cost. In museums, a schematic design will serve as a map, illustrating the placement of specific artifacts and displays.

For the purpose of planning interpretive talks, the content of the schematic design should include an ordered outline of the subject matter to be presented in the talk, including an inventory of the artifacts and other visual resources to be used.

School Group Programs

Programs created for school groups should incorporate hands-on and/or interactive-learning opportunities and take into account different learning styles. Such programs should also support the needs of the educational community, so it is important for program planners and presenters to keep abreast of current educational trends and initiatives nationally, on the state level and locally. All programs developed for school groups should be aligned with State of California Educational frameworks and their associated academic content standards, as applicable.

Effective partnerships with schools today will result in an environmentally and culturally literate society in the future.

California's school children represent the park system's most consistent and diverse visitors. Schools, school districts and county offices of education represent the greatest opportunity for partnerships and collaborations. Effective partnerships with schools today will result in an environmentally and culturally literate society in the future. (DOM § 0904.6.16.1)

Scope of Collections

This term is used to describe the current status and future plans for long-term management of a park unit's museum objects. This encompasses what the collection includes, what to add, what not to add, and what may need to be removed from the collection. A Scope of Collections Statement (SOCS) is a document that conveys this information.

Secondary Theme

Secondary themes provide valuable, but nonessential information related to the unifying and primary themes. Secondary themes may be only tangentially related to the unifying theme.

Self-Guided Trails

Self-guided trails can effectively interpret the extent of a historic area's development or a natural area's variety of life forms, forces and natural elements. The resources of self-guided trails are interpreted by brochure descriptions keyed to numbered posts or recognizable landmarks, by audio versions of brochure text, by trail panels, or by visitor-activated message repeaters. Self-guided trails can serve large numbers of users, at their own pace, and at all times.

Sense of Place

The term “sense of place” is often used to describe either the intrinsic character of a place, or the meaning people give to it. Often a sense of place incorporates both these elements. Some places are distinctive through their physical appearance, while others have value and meaning ascribed to them through historical events or personal connections people make with the resources. The term is often used in relation to those characteristics that make a place special or unique, as well as those that foster a sense of human attachment and belonging.

Service Learning

Service Learning is a teaching method that blends community-based learning with theory and practice. Service learning differs from traditional community service activities in that it has a strong and identifiable connection with established curricula, although it does at the same time help meet community needs.

Service learning has a strong connection with school curricula, and also meets community needs.

Social Media

Social media comprises various forms of communication, such as text, photos and video, which allow interaction among individuals, groups and organizations. Social media consists primarily of Internet- and mobile-based tools for sharing and discussing information. For government departments, it is another tool to communicate openly with the people we serve. (For more information, refer to the Department’s *Social Media Handbook*.)

Stakeholder

A stakeholder is a person who has a vested interest in a place, program, issue or process (National Association for Interpretation definition). Stakeholders may be park employees, user groups, docents and volunteers, neighbors, concessionaires, cooperating associations, government agencies, local ethnic and cultural groups and community decision-makers. (DOM Section 0902.3.1)

Storyline

Storylines expand on the themes. They outline the key ideas, quotations, information, examples, etc., that help support or illustrate the theme. Storylines serve as a guide for interpretive writers and exhibit designers in the exhibit concept and design phases. As such, storylines are initial guides that will be revised and modified in the final exhibit design process.

Strategies

Strategies are the approaches used to accomplish one or more objectives. They are specific and measurable. In an Interpretation Master Plan, strategies are not prioritized. In an Interpretation Action Plan, strategies are prioritized.

Supporting Themes

Supporting themes provide more detailed perspectives on one or more of the primary themes.

Tasks

Tasks are the specific steps needed to carry out particular strategies.

The description of the task should identify as much supporting information as required to allow the successful accomplishment of the task. At the least it should identify the person(s) responsible for accomplishing the task, and the resources needed to accomplish the task. The level of detail depends on the type of plan. Tasks are listed and prioritized in Interpretation Action Plans, Annual Implementation Plans and in Interpretation Project/Program Plans.

Unifying Theme

A unifying (or overall) theme provides a conceptual focus and general approach for the interpretive offerings. It establishes the overall tone and direction and implies the desired outcome interpretation should have on visitors' attitudes and perspectives. The unifying theme is presented through the interpretation of the primary, secondary and supporting themes.

Unit Data Files (UDF)

The UDF is the working file that contains an organized body of information about a unit and references the location of other pertinent research information about the unit. It acts as an organized collection of both unit data and the status of current issues. (*Planning Handbook* definition)

Vignette

Vignettes are areas within formal exhibits that, with the use of historically accurate or period-appropriate architectural features, fixtures and/or collections, furnishings and decor, illustrate a particular historical setting for interpreting an event, activity or period.

Vision Statement

A vision statement identifies what you want your program or organization to become. Vision is a long-term view, sometimes describing what the organization wishes the world in which it operates to be. A vision creates eagerness about the future and provides a driving force to get there.

Visitor Centers/Interpretive Centers

Visitor centers (often also called interpretive centers) are staffed facilities that help visitors transition from their cars or other transportation to the natural, cultural or recreational environment of a park.

A visitor center may contain exhibits, visitor facilities and interpretive information. They may offer a variety of in-depth interpretive media—formal exhibits, historic setting vignettes and audiovisual facilities—to inspire visitors to explore, learn about and protect the area's resources. (DOM § 0905.4.1)

Visitor centers help visitors transition from transportation to the park experience.

Workshop and Storage Areas

A workshop/storage area can be useful for preparing exhibits and items used in interpretive programs. This storage should be kept separate from the museum collections storage facility. A "clean" space is required where accessioning, researching, cataloguing and photographing collections can take place. This area should not only be safe and secure, but also environmentally stable, where permanent records related to the collections can also be stored.

APPENDIX B:

SELECTED RESEARCH INSTITUTIONS AND WEBSITES

Anaheim Public Library, Historic Anaheim Photos

http://www2.anaheim.net/article.cfm?id=415

500 W. Broadway, Anaheim, CA 92805

Telephone: 714.765.1880 Fax: 714.765.1730

Emphasis is placed on images documenting Anaheim's founding as the first planned community in Orange County. Subject areas include local geography, Native Americans, explorers, ranchos, missions, Anaheim's immigrant German founders, viticulture, agriculture, industry, transportation, social life and customs, education, local government, ethnic groups, labor relations, local economy, women, World War I and II, natural disasters, Anaheim Resort area and Googie architecture.

ABOUT WEB-BASED VERSUS IN-PERSON RESEARCH

As web-based research has grown, many research institutions have made some or all of their catalogs, documents, and images available on the Internet. Many also participate in the Online Archives of California and other collaborative web-based research sites, where you can search multiple collections at the same time. There is still a place for in-person research, though, for those catalogs, documents or objects not yet represented online or not suitable for digitization.

Autry National Center: Institute for Study of the American West

http://www.autrynationalcenter.org/autry_library.php

Griffith Park Campus, 4700 Western Heritage Way, Los Angeles, CA, 90027-1462

Telephone: 323.667.2000 Fax: 323.660.5721

The Autry Library collects books, serials, sound recordings, and printed materials related to the history, geography, fine arts, and material, popular and consumer culture of the American West. Areas of strength include personal accounts of pioneer and cowboy life, ranching, tourism, women in the West, cowboy dress and equipment, literature, Western music, radio, television and film history, and popular Western imagery. Library resources provide a historical, social and cultural context for the artifact and archival collections of the Museum of the American West.

Bowers Museum

http://www.bowers.org/

2002 N. Main St., Santa Ana, CA 92706

Telephone: 714.567.3600 E-mail: collections@bowers.org

The Bowers Museum holds in its collection more than 130,000 works of art. These works were donated from 1935 to the present and represent many regions and cultures of the world. The museum's largest collections are in the areas of Native American art, Pre-Columbian art, Asian art, art of the Pacific, art of Africa and Orange County history.

Calflora Database

http://www.calflora.org

Calflora provides "information on wild California plants for conservation, education, and appreciation." It also allows the user to access hundreds of thousands of plant photographs on UC Berkeley's CalPhotos database.

California Academy of Sciences

http://www.calacademy.org/about/

55 Music Concourse Drive, Golden Gate Park, San Francisco, CA 94118

Telephone: 415.379.8000

The Academy is an international center for scientific education and research and is at the forefront of efforts to understand and protect the diversity of Earth's living things. The Academy's research collections, which are among the world's largest, include more than 20 million specimens—essential tools for comparative studies on the history and future of the natural world.

California African American Museum

http://www.caamuseum.org/ler.htm

Exposition Park, 600 State Drive, Los Angeles, CA 90037

Telephone: 213.744.7432

The mission of the California African American Museum is to research, collect, preserve and interpret for public enrichment, the history, art and culture of African Americans with emphasis on California and the western United States. The Research Library supports the mission of the California African American Museum, housing more than 20,000 items of books, periodicals, and records.

California Department of Fish and Wildlife: CWHR Life History Accounts and Range Maps

http://www.dfg.ca.gov/biogeodata/cwhr/cawildlife.aspx

Life history accounts and range maps for 694 California amphibian, mammal, bird and reptile species.

California Historical Society

http://www.californiahistoricalsociety.org/about/index.html

678 Mission Street, San Francisco, CA 94105

Telephone: 415.357.1848 Fax: 415.357.1850 E-mail: info@calhist.org

The current CHS headquarters accommodate the administrative offices, North Baker Research Library, exhibition galleries, and museum store. Serving over 3,500 people a year, the North Baker Research Library provides an extensive collection of manuscripts, maps, posters, printed ephemera, books, and pamphlets. The CHS Photography Collection contains over 500,000 images including works by Eadweard Muybridge and Ansel Adams. The CHS Fine Arts Collections encompass roughly 5,000 works of art reflecting all aspects of California History. CHS keeps an active exhibition schedule, and publishes California History, a quarterly journal.

California State Archives

http://www.sos.ca.gov/archives/collections/

1020 "O" Street, Sacramento, CA 95814

Telephone: 916.653.2246 Fax: 916.653.7363 E-mail: ArchivesWeb@sos.ca.gov

The California State Archives collections document the broad scope of California government and its impact on the people of the state. Over 85,000 cubic feet of records of all types are represented—including millions of documents and bound volumes; 20,000 maps and architectural drawings; 250,000 photographs; 7,500 video and audio tapes; as well as hundreds of artifacts.

California State Library, California History Room

http://www.library.ca.gov/calhist/index.html

Library and Courts II Building, 900 N Street, Room 200, Sacramento, CA 95814

Telephone: 916.654.0176 Fax: 916.654.8777 Email: cslcal@library.ca.gov

The California History Section holds a major collection of documents from and about California's rich history. The documents range from books, maps, newspapers, and periodicals, to pictorial materials (including daguerreotypes, lithographs, stereographs, and paintings) and ephemera (such as posters, programs, pamphlets, and sheet music).

California State Library, Sutro Library

http://www.library.ca.gov/collections/index.html#sutro

480 Winston Drive, San Francisco, CA 94132

Telephone: 415.731.4477 Fax: 415.557.9325 Email: sutro@library.ca.gov

The Sutro Library in San Francisco offers customers the most extensive genealogy collection west of Salt Lake City, a comprehensive United States local history collection, Adolph Sutro's rare book and manuscript collections, genealogical, family and local history catalogs, special indexes, guides, and bibliographies.

California State Parks Archives

http://www.parks.ca.gov/?page_id=1080

Resources Agency Building, 1416 Ninth St.- Room 943, Sacramento, CA 95814

Telephone: 916.651.6959 E-mail: archives@parks.ca.gov

The purpose of the Archives is to increase the Department's knowledge base by actively acquiring documents in a variety of formats that serve to further the research needs of the Department. The Archives is a clearinghouse for studies, surveys, bibliographies, reports, plans, and other records created by Parks staff that have enduring value.

California State Parks Photographic Archives

http://www.parks.ca.gov/photoarchives/

2517 Port Street, West Sacramento, CA 95691

Telephone: 916.375.5930 Fax: 916.371.0301 E-mail: photoarc@parks.ca.gov

The Photographic Archives is home to approximately 200,000 images depicting the natural and cultural resources of California State Parks. Holdings consist of about 100,000 prints and negatives in black and white and color, about 35,000 contemporary color slides in 35 mm format, approximately 60,000 images awaiting processing, and a small number of lantern slides and glass plates. The photographs were taken between 1900 and the present, with the majority taken between 1950 and 1985. Materials in the 35 mm slide format tend to be more contemporary in nature, dating between 1970 and the present.

California State Railroad Museum Library and Archives

http://www.csrmf.org/doc.asp?id=14

111 "I" Street, Sacramento, CA 95814

Telephone: 916.445.7387

The California State Railroad Museum maintains extensive collections of archival, three dimensional artifacts, and other items. These collections focus on all aspects of railroads and railroading with particular emphasis on topics pertaining to California and the west.

California State University, Chico: Meriam Library

http://www.csuchico.edu/lbib/spc/iepages/home.html

Chico, CA 95929-0295

Telephone: 530.898.5862 Fax: 530.898.4443

The Special Collections Department of the Meriam Library is a unique regional resource of written and pictorial materials, which document the historical as well as the contemporary issues of the 12-county region known as "northeastern California".

CalPhotos

http://calphotos.berkeley.edu/

CalPhotos is a collection of 184,421 photos of plants, animals, fossils, people, and landscapes from around the world. A variety of organizations and individuals have contributed photographs to CalPhotos. The California plant and animal collections are especially strong.

Center for Sacramento History

http://www.cityofsacramento.org/ccl/history/

551 Sequoia Pacific Blvd., Sacramento, CA 95811

Telephone: 916.264.7072 Fax: 916.264.7582

The Center for Sacramento History is the repository and research center for the City and County historic collections. These reflect the many aspects of local history and are organized into three major areas: domestic, commercial, and government. Within these areas the holdings consist of the official records of the City and County government, personal manuscript collections, business records, photographs, and artifacts.

Clarke Historical Museum

http://www.clarkemuseum.org/

240 E Street, Eureka, CA 95501

Telephone: 707.443.1947 Fax: 707.443.0290 E-mail: clarkehistorical@att.net

The museum has an extensive photo and document collection relating to Humboldt County history, a large costume and textile collection, and a standard local history museum collection -- weapons, furniture, housewares, toys, china and glass, tools etc. The museum is particularly known for its extensive collection of northwest California Native American baskets and regalia.

Cornell Lab of Ornithology, The Macaulay Library

http://www.birds.cornell.edu/MacaulayLibrary/about

159 Sapsucker Woods Road, Ithaca, New York 14850

Telephone: 607.254.2404 Fax: (607) 254-2439 Email: macaulaylibrary@cornell.edu

The Macaulay Library at the Cornell Lab of Ornithology is the world's largest natural sound and video archive of animal behavior. A large percentage of the recordings can be searched and played online. The Library also provides services for consultation, custom compilations, and professionally edited versions of its assets.

Crocker Art Museum

http://www.crockerartmuseum.org/

216 O Street, Sacramento, CA 95814

Telephone: 916.808.7000 Fax: 916.808.7372 E-mail: cam@cityofsacramento.org

As the leading arts institution in the Sacramento Valley, the Crocker serves as the primary regional resource for the study and appreciation of fine art, with an emphasis on the original Crocker family donation of California art and European drawings, contemporary northern California art and, more recently, of East Asian painting and international ceramics. The Gerald Hansen Library, located on the Ground Floor of the Museum, is a non-circulating library that serves as a research resource for the Museum's many collections. Digital Crocker is the Crocker Art Museum 's online collection of more than 500 works of art.

Eastern California Museum

http://www.inyocounty.us/ecmuseum/

155 N. Grant Street, Independence, CA 93526

Telephone: 760.878.0364 Fax: 760.878.0412 E-mail: ecmuseum@inyocounty.us

The Eastern California Museum is an active research facility, handling more than 200 information requests a year. Collections in the "history file," include primary sources (newspaper articles, newsletters, letters, etc) about Inyo County and Death Valley families, mines, towns and other institutions, including the Manzanar War Relocation Center. The museum also has a concise research library with close to 1,000 volumes. Researchers also can take advantage of the museum's collection of 25,000 photos, dating from the turn of the 20th century, which includes photographs of the region's various Paiute tribal members, towns, farms and ranches, mines, campers, the Eastern Sierra, climbers, etc.

Getty Research Institute Research Library

http://www.getty.edu/research/conducting_research/library/

1200 Getty Center Drive, Suite 1100, Los Angeles, CA 90049-1688

Telephone: 310.440.7390 Fax: 310.440.7780

The Research Library at the Getty Research Institute focuses on the history of art, architecture, and archaeology with relevant materials in the humanities and social sciences. The range of the collections begins with prehistory and extends to contemporary art. Presently, the collections are strongest in the history of western European art and culture in Europe and North America; however, in recent years, they have expanded to include other areas, such as Latin America, Eastern Europe, and selected regions of Asia.

Humboldt County Historical Society

http://www.humboldthistory.org/archive.html

P.O. Box 8000, Eureka, CA 95502

Telephone: 707.445.4342 Fax: 707.445.4146

The Historical Society archive is the primary repository for print materials, maps, and photographs that have a bearing on Humboldt County history. The Society's Research Library contains collections of genealogical information as well as local history.

Huntington Library, Art Collections, and Botanical Gardens

http://www.huntington.org/huntingtonlibrary.aspx?id=562

1151 Oxford Road, San Marino, CA 91108

Telephone: 626.405.2100

The Library is a research institution for the scholarly study of British and American history, literature, art history, and history of science. It has extensive collections of manuscripts, rare books, photographs, prints and ephemera, and scholars are cordially invited to use them. In research materials for historical study, all periods of American history, from the period of discovery to the present, are represented. A Resource for Scholars and genealogists, electronic mission records document 110,000 early residents.

Japanese American National Museum

http://www.janm.org/research/

369 East First Street, Los Angeles, CA 90012

Telephone: 213.625.0414 Fax: 213.625.1770

Since its inception in 1985, the Japanese American National Museum has chronicled more than 130 years of Japanese American history—from the first Issei generation through the World War II incarceration to the present day. In 1999, the National Museum established the Manabi and Sumi Hirasaki National Resource Center (HNRC) to ensure that the story of Japanese Americans remains accessible to everyone.

Japanese American Relocation Digital Archives

http://www.calisphere.universityofcalifornia.edu/jarda/

The experience of Japanese Americans in internment camps during the war is richly documented in the holdings of a number of California repositories -- notably the California Historical Society (CHS); California State Archive (CSA); California State University, Fullerton; the Japanese American National Museum (JANM); UC Berkeley's Bancroft Library; UCLA's Young Research Library Department of Special Collections; University of the Pacific (UOP); and University of Southern California (USC). These holdings can all be accessed and searched via this website.

Latino Museum of History, Art and Culture

http://www.thelatinomuseum.com/ourcollection.htm

514 South Spring Street, Los Angeles, CA 90013

Telephone: 213.626.7600 Fax: 213.627.1993

The Latino Museum's permanent collection reflects the diversity of Latino cultures and welcomes artistic approaches that are both traditional and innovative. The collection of objects, documents, films and books serves as an important educational resource for our local, national and international audiences.

The Living Desert

http://www.livingdesert.org/

47900 Portola Avenue, Palm Desert, CA 92260

Telephone: 760.346.5694 Fax: 760.568.9685

The Mission of the Living Desert is to foster desert conservation through preservation, education and appreciation and to foster, through cooperative research and educational programs, biological studies, contributing to the protection of desert species of the Colorado Desert in the wild state.

Los Angeles Public Library Photo Collection

http://photos.lapl.org/carlweb/jsp/photosearch_pageADV.jsp

The Los Angeles Public Library Photo Collection emphasizes the history of Los Angeles, Southern California, and California. This Internet-accessible collection is one of the treasures of the Central Library. The collection itself is not available for physical browsing in person. Contact the library at the telephone numbers or email addresses on the website for information on acquiring and using images.

Loyola Marymount University, Leavey Center for the Study of Los Angeles

http://www.lmu.edu/libraries_research/lcsla/Research_Collection.htm

William H. Hannon Library MS-8200, Loyola Marymount University, 1 LMU Drive, Los Angeles, CA 90045

Telephone: 310.338.5710 Fax: 310-338-5895 E-mail: Special.Collections@lmu.edu

The Research Collection is a program of the Thomas and Dorothy Leavey Center for the Study of Los Angeles. The Center collects papers of Los Angeles public officials; Los Angeles real estate and industrial developers; reformers and reform movements, principally in late twentieth-century Los Angeles; and prominent Roman Catholic families in Los Angeles; and has other collections related to Los Angeles history and politics. The Archives and Special Collections also include an extensive postcard collection, university archives, art and artifacts, and manuscripts.

Monterey Bay Aquarium Research Institute

http://www.mbari.org/

7700 Sandholdt Road, Moss Landing, CA 95039-9644

Telephone: 831.775.1700 Fax: 831.775.1620

The mission of MBARI is to achieve and maintain a position as a world center for advanced research and education in ocean science and technology, and to do so through the development of better instruments, systems, and methods for scientific research in the deep waters of the ocean. MBARI emphasizes the peer relationship between engineers and scientists as a basic principle of its operation. All of the activities of MBARI must be characterized by excellence, innovation, and vision.

Natural History Museum of Los Angeles County

http://www.nhm.org/site/research-collections

900 Exposition Boulevard, Los Angeles, CA 90007

Telephone: 213.763.3388

The museum collection includes 105,000 books and 125,000 periodical volumes, a few of nearly 400 plates belonging to the Research Library's Zoological Prints collection, and a small number of the world's butterflies and moths, taken from Dru Drury's three-volume monograph entitled Illustrations of Exotic Entomology.

Oakland Museum of California

http://collections.museumca.org/

1000 Oak Street@ 10th St., Oakland, CA 94607

Telephone: 510.238.2200

The Museum's extensive collection of California's historical artifacts, works of art, ethnographic materials, and natural specimens, represents the material legacy of California and its people.

Online Archive of California

http://oac.cdlib.org/

The OAC brings together historical materials from a variety of California institutions, including museums, historical societies, and archives. Over 120,000 images; 50,000 pages of documents, letters, and oral histories; and 8,000 guides to collections are available.

Pasadena Museum of History

http://www.pasadenahistory.org/research/index.html

470 W. Walnut St., Pasadena, CA 91103

Telephone: 626.577.1660 Fax: 626.577.1662 E-mail: info@pasadenahistory.org

The Pasadena Museum of History maintains the area's largest and most comprehensive collection of documents and *http://www.pasadenahistory.org/research/collectionsdata.htmlartifacts* relating to the history of Pasadena and the west San Gabriel Valley. The ever-expanding collection spans the years 1834 to the present and contains well over one million historic photographs, rare books, manuscripts, maps and architectural records.

Riverside Metropolitan Museum

http://www.riversideca.gov/museum/hist-archival.asp

3580 Mission Inn Ave., Riverside, CA 92501-3307

Telephone: 951.826.5273

The Riverside Metropolitan Museum's Archival Collections document the history and growth of the city from the 1860s through to the present. Included in the archives are approximately 20,000 photographs, the personal and business papers of some of the region's prominent citrus growers and packers like L.V.W. Brown, Ethan Allen Chase, and Samuel C. Evans, Jr., newspapers, maps, documents, drawings, ephemera, and other material. The Museum also maintains one of the largest collections of citrus labels in California.

San Bernardino County Museum

http://www.sbcounty.gov/museum/

2024 Orange Tree Lane, Redlands, California 92374

Telephone: 909.307.2669 Fax: 909.307.0539

The San Bernardino County Museum maintains and develops unique cultural and natural science collections related to the region and the greater Southwest.

San Bernardino Public Library: Arda Haenszel California Room

http://www.sbpl.org/calif.html

555 West 6th Street, San Bernardino, CA 92410

Telephone: 909.381.8208

The collections consist of photographs, periodicals, oral histories, and ephemera related to the history of San Bernardino.

San Diego Historical Society Research Library

http://www.sandiegohistory.org/research_library.html

1649 El Prado, Balboa Park, San Diego, CA 92101

Telephone: 619.232.6203 ext. 163

The Research Library is home to extensive collections that document the people, places and stories of San Diego past and present. The document and photograph collections in the Research Library constitute a rich documentation of the region's history. Researchers can access San Diego history through books, ephemera, original maps, manuscripts, architectural drawings, public records, and our extensive photographic collection.

San Diego Museum of Man

http://www.museumofman.org/collections

1350 El Prado, Balboa Park, San Diego, CA 92101

Telephone: 619.239.2001 Fax: 619.239.2749

The Museum's research collections include 72,000 items plus 37,000 historic photographs, mostly of Native Americans, and unquantified archaeological holdings.

San Diego Natural History Museum

http://www.sdnhm.org/science/research-library/collections/

1788 El Prado, Balboa Park, San Diego, CA 92101

Telephone: 619.232.3821 Fax: 619.232.0248

The extensive scientific collections of the Biodiversity Research Center of the Californias represent a permanent record of natural heritage. They contain materials that support the research of many scientific disciplines, including those working to define and preserve biodiversity and monitor global change.

San Diego State University Special Collections and University Archives

http://library.sdsu.edu/guides/scua/sub2.php?id=34&pg=56

5500 Campanile Drive, San Diego, CA 92182-8050

Telephone: 619.594.6791 Fax: 619.594.0466 E-mail: scref@rohan.sdsu.edu

Special Collections and University Archives houses rare, fine, unique, and valuable books, periodicals, manuscripts, and documents which require security and care in handling. Other valuable historical items such as photographs, prints, postcards, memorabilia, scrapbooks, and oral histories are also held in Special Collections.

San Francisco State University: Labor Archives and Research Center

http://www.library.sfsu.edu/about/depts/larc.php

480 Winston Drive, San Francisco, CA 94132

Telephone: 415.564.4010 Fax: 415.564.3606 E-mail: larc@sfsu.edu

The Labor Archives collection includes materials from the counties surrounding San Francisco Bay, including Alameda, Contra Costa, Marin, San Francisco, San Mateo, and Santa Clara.

More than 6,000 feet of primary source material is available for research. From the beginning of the twentieth century to the present, a wide scope of Bay Area labor activity is represented.

San Joaquin County Historical Society and Museum

http://www.sanjoaquinhistory.org/library.php

Micke Grove Regional Park 11793 N. Micke Grove Road, Lodi, CA 95240

Telephone: 209.331.2055 Fax: 209.331.2057 E-mail: info@sanjoaquinhistory.org

Named for Gerald Driscoll Kennedy (1891-1954), the Reference Library is located in the Erickson Building and holds the San Joaquin County Historical Society's collection of books, manuscripts, business and legal records, maps, photographs, and ephemera pertaining to San Joaquin County history.

Santa Barbara Historical Museum

http://santabarbaramuseum.com/Gledhill_Library.html

136 East De La Guerra St, Santa Barbara, CA 93101

Telephone: 805.966.1601 Fax: 805.966.1603

The Gledhill Library contains rare literary and visual documents including 50,000 historic photographs. Two early 19th century buildings, the 1817 Casa Covarrubias and the 1836 Historic Adobe are adjacent to the Museum.

Santa Clara County Archives

http://archives.sccgov.org/

1875 Senter Road, San Jose, CA 95112

Telephone: 408.755-7895 Fax: 408-755-7897 E-mail: Archives@ceo.sccgov.org

The mission of the Santa Clara County Archives is to collect, preserve, and make available the historical records of Santa Clara County government. The Archives' goals are to be a center for research and information about Santa Clara County and to foster an appreciation and understanding of the county's history and development.

Seaver Center for Western History Research

http://www.nhm.org/research/history/seaver_center.html

Natural History Museum of Los Angeles County

900 Exposition Boulevard, Los Angeles, CA 90007

Telephone: 213.763.3359

The purpose of the Seaver Center for Western History Research is to collect, preserve, and make available to the general public research materials documenting the history of the trans-Mississippi West with special emphasis on Southern California and Los Angeles. Historic records include—but are not necessarily limited to—manuscript materials, books, serials, pamphlets, broadsides, maps, posters, prints, and photographs.

Sierra Club

http://www.sierraclub.org/

The Sierra Club maintains an archive of information related to club history, some of which is pertinent to the history of California State Parks. Local chapters may be a good source for photographs for use in park presentations, exhibits and programs.

Siskiyou County Museum

http://www.siskiyoucountyhistoricalsociety.org/siskiyou-county-museum

910 South Main St., Yreka, CA 96097

Telephone: 530.842.3836

The Siskiyou County Museum was built in 1950 by the county to collect, preserve, disseminate and interpret the history of the area for future generations. The Museum features exhibits detailing Siskiyou County's colorful history from Indian cultures to 20th-century themes. The Museum is an interpretive center for the history of Siskiyou County and includes exhibits, programs, and a research library.

Southern California Library for Social Studies and Research

http://www.socallib.org/collections/index.html

6120 S. Vermont Avenue, Los Angeles, CA 90044

Telephone: 323.759.6063 E-mail: web@socallib.org

The Library holds collections that span the breadth of social and political movements in Los Angeles—from labor, civil rights, education, and housing to immigration, war and peace, and civil liberties. These collections include over 400 manuscript collections, as well as books, periodicals, subject files, pamphlets, posters, photographs, films, audiotapes, and more.

Stanford University Library, Department of Special Collections

http://library.stanford.edu/depts/spc/spc.html

Green Library, 557 Escondido Mall, Stanford, CA 94305

Telephone: 650.725.1022

The Stanford University Collections include rare books, manuscripts, university archives, electronic media, historic maps, and memorial library of music.

Sutter's Fort SHP Archives

http://www.parks.ca.gov/?page_id=24159

2701 L Street, Sacramento, CA 95816

Telephone: 916.445.4422 E-mail: SuttersFortArchives@parks.ca.gov

The Sutter's Fort State Historic Archives is a repository for information about John Sutter, Sutter's Fort, and the experiences of early California pioneer families. The collections include photographs, diaries, letters, maps, and business records.

University of California, Berkeley, The Bancroft Library

http://bancroft.berkeley.edu/collections/

Berkeley, CA 94720-6000

Telephone: 510.642.3781 Fax:510.642.7589

The Bancroft Library is the primary special collections library at the University of California, Berkeley. One of the largest and most heavily used libraries of manuscripts, rare books, and unique materials in the United States, Bancroft supports major research and instructional activities and plays a leading role in the development of the University's research collections.

University of California, Berkeley, Bancroft Library, Regional Oral History Office

http://bancroft.berkeley.edu/ROHO/

This can be reached via the Bancroft website, but is worth including in its own listing. The user can download transcripts of oral history sessions related to California. There are some real gems here, including oral history from past State Parks directors Newton Drury and William Penn Mott, Jr.

University of California, Berkeley

Phoebe Apperson Hearst Museum of Anthropology

http://hearstmuseum.berkeley.edu/

103 Kroeber Hall, University of California, Berkeley, CA 94720-3712

Telephone: 510.642.3682 Fax: 510.642.6271

The Hearst Museum houses the oldest and largest anthropological collection in the West. The Museum preserves and interprets a global record of material culture through its more than 3.8 million objects. It also promotes the history and diversity of human cultures through research, exhibitions, and programs.

University of California, Berkeley, UC Botanical Garden

http://botanicalgarden.berkeley.edu/visit/visit.shtml#

200 Centennial Drive, Berkeley, CA 94720-5045

Telephone: 510.643.2755 Fax: 510.642.5045 E-mail: Garden@berkeley.edu

The University of California Botanical Garden is a living museum open to the public featuring one of the most diverse plant collections in the United States. Established in 1890, the Garden's 34 acres contain over 12,000 different kinds of plants from all over the world arranged by region. Plant materials are made available for research projects affiliated with universities and other research institutions all over the world.

University of California, Davis, Shields Library, Special Collections

http://www.lib.ucdavis.edu/dept/specol/about/aboutus.php

100 N.W. Quad, Davis, CA 95616-5292

Telephone: 530.752.1621 Fax: 530.754.5758 E-mail: speccoll@ucdavis.edu

The Department of Special Collections, established July 1966, houses the Library's rare books, manuscript collections, the University Archives, and other non-circulating research materials requiring care and control that cannot be provided in the open stacks.

University of California, Irvine, Special Collections and Archives

http://special.lib.uci.edu/

P.O. Box 19557, Irvine, CA 92623-9557

Telephone: 949.824.7227 Fax: 949.824.2472 Email: spcoll@uci.edu

Special Collections and Archives houses the UC Irvine Libraries' collections of rare books, manuscripts, archives, photographs, and other rare and special materials. Significant collections include the University Archives (UCI history), the Southeast Asian Archive, the Critical Theory Archive, Orange County and California history, dance and the performing arts, political pamphlets, artists' books, small press poetry, British Naval History, and the scholarly papers of prominent UCI faculty.

University of California, Los Angeles, Department of Special Collections

Charles E. Young Research Library

http://www2.library.ucla.edu/libraries/researchlibrary/index.cfm

Box 951575, 11630 Charles E. Young Research Library

Los Angeles, CA 90095-1575

Telephone: 310.825-4732 Fax: 310.206.1864

The Charles E. Young Research Library provides research-level collections and services in the humanities, social sciences, education, public affairs, government information, and maps, primarily designed to support graduate students and faculty.

University of California, Los Angeles, Southern Regional Library Facility

http://www.srlf.ucla.edu/

Box 951388, 305 De Neve Drive, Parking Lot 17, Los Angeles, CA 90095-1388

Telephone: 310.206.2010 Fax: 310.206.5074 E-mail: srlf-request@library.ucla.edu

Established in 1987, the Southern Regional Library Facility (known as the SRLF) provides space for University of California library materials, archives and manuscript collections.

University of California, Riverside, California Museum of Photography

http://www.cmp.ucr.edu/

3824 Main St, Riverside, CA 92501

Telephone: 909.827.4787 Fax: 909.827.4797

UCR/California Museum of Photography provides a cultural presence, educational resource, community center and intellectual meeting ground for the university and the general public. The museum's explorations of photographic media through exhibition, collection, publication, and the web examine the history of photography and showcase current practice in photography and related media.

University of California, Riverside, Tomás Rivera Library

http://library.ucr.edu/?view=libraries/rivera

3401 Watkins Dr., Riverside, CA 92521

Telephone: 951.827.3220

The Tomás Rivera Library, including Special Collections & Archives, is home to the famed Eaton Collection, the world's largest cataloged collection of science fiction and fantasy. Special Collections at the UCR Libraries houses many excellent collections, including books, manuscripts, photographs, videotapes, broadsides, and other media, covering a wide range of special subject areas. In addition, the department houses a strong local history collection, along with the University Archives. The Rivera Library also serves as a Government Publications depository for United States and California state documents, a United States Patent and Trademark Depository Library and maintains various types of instructional and learning materials in Education Services for teachers in training.

University of California, San Diego Mandeville Special Collections Library

http://www.ucsd.edu/portal/site/Libraries

9500 Gilman Drive, La Jolla, CA 92093-0175

Telephone: 858.534.2533 Fax: 858.534.5950 Email: spcoll@ucsd.edu

The library's collections include: American Institute of Wine & Food Culinary Collection; Archive for New Poetry; Baja California Collection; Don Cameron Allen Renaissance Collection; Dr. Seuss Collection; Goodman Californian Collection; Hill Collection of Pacific Voyages; Melanesia; Southworth Spanish Civil War Collection; Twentieth-Century Science & Public Policy; UCSD Archives; and Western Americana.

University of California, San Diego, Scripps Institution of Oceanography Archives

http://libraries.ucsd.edu/locations/sio/scripps-archives/index.html

9500 Gilman Drive, Dept 0219, La Jolla, CA 92093-021

Telephone: 858.534.3274 Fax: 858.534.5269 Email: siocirc@ucsd.edu

Offering much more than an ocean view and a great place to study, Scripps Institution of Oceanography Library is the largest oceanography library in the world, offering unparalleled resources in marine and earth sciences.

University of Southern California, Digital Archives

http://digarc.usc.edu/search/controller/index.htm

Spanning a wide range of visual media, the USC Digital Archive offers digital images of drawings, illuminated manuscripts, maps, photographs, posters, prints, rare illustrated books, as well as audio and video recordings. Encompassing the subject strengths of the vast collections of the libraries at the University of Southern California, these materials represent the applied sciences, fine and decorative arts, history, performing arts, and social sciences.

US Dept. of Fish and Wildlife Services National Digital Library

http://digitalrepository.fws.gov/

Here you will find a wide assortment of selected images, publications, video and audio clips that are in the public domain.

US Forest Service, Photo and Video Gallery

http://www.fs.fed.us/photovideo/

Find-a-photo allows you to access thousands of copyright free wildlife, fish, wildflower and environmental education photographs, donated by Forest Service employees and our partners and volunteers. The forest service is also in the process of adding tens of thousands of photos on their website. The video library has a free-loan lending library system.

Wells Fargo Corporate Archives

http://www.wellsfargohistory.com/archives/archives.htm

420 Montgomery Street (A0101-106), San Francisco, CA 94163

Email: historical services@wellsfargo.com

Wells Fargo & Company maintains corporate records for the use of company in legal, administrative and trademark issues. Archival documents also support the history of Wells Fargo and its operations since 1852.

Yuba County Library

http://www.co.yuba.ca.us/departments/library/CaliforniaRoom.aspx

303 2nd St. Marysville, CA 95901

Telephone: (530) 749-7380 Fax: (530) 741-3098

The John Packard Library of Yuba County is one of the oldest public libraries west of the Mississippi. It was originally organized by the Young Men's Literary and Scientific Association in 1855 as the Marysville Library Association. The main objective of the association was to gather materials together and maintain a reading room where its members could come together socially and improve their mental state. The first books purchased by the Association were bought in New York and shipped around the Horn. Donations of books, magazines, pamphlets and maps were made by benevolent friends to stock the library before the shipment from New York arrived.

APPENDIX C:

REFERENCES AND RESOURCES FOR INTERPRETATION

This list of References and Resources for Interpretation has been organized by category for ease of use. Note: Some references may be found in more than one section because of the breadth of information they offer. Many of the California State Parks-produced resources may be accessed at: **www.parks.ca.gov/interptools/**.

If you have suggestions for improving this list of references in future editions, please contact California State Parks' Interpretation and Education Division at **interp@parks.ca.gov**.

General Interpretation

Beck, Larry and Ted Cable
Interpretation for the 21st Century: Fifteen Guiding Principles for Interpreting Nature and Culture. 2nd ed. Champaign, IL: Sagamore Publishing, 2002.

Brochu, Lisa and Tim Merriman
Personal Interpretation: Connecting Your Audience to Heritage Resources. 2nd Edition. Fort Collins, CO: InterpPress, 2008.

Ham, Sam H.
Environmental Interpretation: A Practical Guide for People with Big Ideas and Small Budgets. Golden, CO: Fulcrum Publishing, 1992.

The Interpreter. Produced six times annually. Fort Collins, CO: National Association for Interpretation (NAI).

Journal of Interpretation Research. Produced twice annually. Fort Collins, CO: National Association for Interpretation (NAI).

Knudson, Douglas M., Ted T. Cable and Larry Beck
Interpretation of Natural and Cultural Resources. State College, PA: Venture Publishing, Inc., 2003.

Larsen, David L., ed. *Meaningful Interpretation: How to Connect Hearts and Minds to Places, Objects, and Other Resources.* Fort Washington, PA: Eastern National, 2003.

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Lies My Teacher Told Me: Everything Your High School History Textbook Got Wrong. Rev. ed. New York, NY: Touchstone, 2007.

Machlis, Gary E., and Donald R. Field, eds.
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Interpreting Our Heritage. 4th ed. Chapel Hill, NC: University of North Carolina Press, 2008.

Interpretive Planning

Ames, Kenneth, Barbara Franco, and L. Thomas Frye, eds.
Ideas and Images: Developing Interpretive History Exhibits. Walnut Creek, CA: Alta Mira Press, 1995.

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Creating Great Visitor Experiences: A Guide for Museums, Parks, Zoos, Gardens, & Libraries. Walnut Creek, CA: Left Coast Press, Inc., 2007.

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Brown, William E.
Islands of Hope: Parks and Recreation in Environmental Crisis. Arlington, VA: National Recreation and Parks Association, 1971, reprinted 1982.

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Communicating Nature: How We Create and Understand Environmental Messages. Washington, D.C.: Island Press, 2006.

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A Sand County Almanac: With Essays on Conservation from Round River. New York, NY: Random House Publishers, 1986.

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Last Child in the Woods: Saving Our Children from Nature-Deficit Disorder. Rev. ed. Chapel Hill, NC: Algonquin Books of Chapel Hill, 2008.

Mills, Enos A.
The Adventures of a Nature Guide. Grand Rapids, MN: Kessinger, LLC, 2007.

The Story of a Thousand Year Pine. Boston, MA: Houghton Mifflin, 1914, reprinted 1999.

Strauss, Susan
The Passionate Fact: Storytelling in Natural History and Cultural Interpretation. Golden, CO: Fulcrum Publishing, 1996.

California's Natural Resources

Bakker, Elna S.
An Island Called California: An Ecological Introduction to Its Natural Communities. 2nd ed., revised and expanded. Berkley and Los Angeles, CA: University of California Press, 1984.

Barbour, Michael, Bruce Pavlik, Frank Drysdale and Susan Lindstrom
California's Changing Landscapes: Diversity and Conservation of California Vegetation. Sacramento, CA: California Native Plant Society, 1993.

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Cultural Resource Interpretation

Alderson, William T., and Shirley Paine Low
Interpretation of Historic Sites. 2nd ed. Nashville, TN: Altamira Press & The American Association for State and Local History, 1986.

American Association for State and Local History (AASLH). Nashville, TN
http://www.aaslh.org/

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Abeloe. Revised by Douglas E. Kyle
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California State Board of Education
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Curriculum Frameworks for Foreign Language, Health, History-Social Science, Mathematics, Physical Education, Reading & Language Arts, Science, and Visual and Performing Arts: http://www.cde.ca.gov/be/st/fr/

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American Association of Museums. Washington, D.C. http://www.aam-us.org/

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The Official Museum Products and Services Directory
Published annually. Washington, D.C.: American Association of Museums.

APPENDIX D:

OTHER RESOURCES FOR INTERPRETATION PLANNING

Acorn Naturalists

155 El Camino Real, Tustin, California, 92780

Telephone: 800.422.8886 E-mail: EMailAcorn@aol.com

http://www.acornnaturalists.com/

Acorn Naturalists was founded by two professional educators over seventeen years ago. The first catalog, a 16-page booklet, has grown to several hundred pages, showcasing over 8,000 science and nature resources for the trail, classroom and hands-on programs. Acorn is also a good source for skull and track reproductions that can be used in exhibits.

American Association of Museums, Committee on Audience Research and Evaluation (CARE).

http://www.care-aam.org/

CARE is made up of audience researchers and evaluators who work in museums, independent professionals and others interested in audience research in museums and other cultural institutions. The website includes presentations on visitor studies from past AAM annual meetings.

American Evaluation Association

http://www.eval.org/

The American Evaluation Association is an international professional association of evaluators devoted to the application and exploration of program evaluation, personnel evaluation, technology and many other forms of evaluation.

California Department of Education

1430 N Street, Sacramento, CA 95814

Telephone: 916.319.0800

http://www.cde.ca.gov/ci/

Source for K-12 curriculum content standards and frameworks, statistical data on education and listings of schools and school districts.

National Center on Accessibility

http://www.ncaonline.org

NCA is a leading authority on park and recreation program and facility access issues. The Center is a cooperative effort of Indiana University and the National Park Service.

The "Access A to Z" section of the website has specific exhibit and interpretation information. The website also includes a product directory, publications, research and accessibility education. An especially helpful page for interpretive services planning "ADA Approved and Other Accessible Product Myths: Choosing Products to Improve Access at Your Parks and Facilities." Access this page directly at http://www.ncaonline.org/resources/articles/ada_approved.shtml

National Park Service, Harpers Ferry Center: HFC Editorial Style Guide

http://www.nps.gov/hfc/pdf/hfc-style-guide-2007.pdf

Since there is not a California State Parks Style Guide (yet), this is a good one to consult. It gives the National Park Service's preferred word choices, focusing on concepts often used in park interpretation and signage but not as common in general writing. Example entries are "tree line" instead of "timberline," "shuttle bus" instead of "shuttlebus," when to capitalize "ranger," and when to use "boat ramp" instead of "boat launch."

National Park Service, Harper's Ferry Center: Media Evaluation & Visitor Research

http://www.nps.gov/hfc/products/evaluate.htm

Good explanations of front-end, formative and summative evaluation, with links to many examples of each.

National Association for Interpretation

230 Cherry Street, Fort Collins, CO 80521

Telephone: 888.900.8283 Fax: 970.484.8179

http://www.interpnet.com/

The National Association for Interpretation (NAI) is a not-for-profit 501c3 professional association for those involved in the interpretation of natural and cultural heritage resources in settings such as parks, zoos, museums, nature centers, aquaria, botanical gardens and historical sites. NAI offers an annual national workshop that attracts over 1,000 people, an international conference, regional and special-interest section workshops, full-color magazine (Legacy), professional journal (Journal of Interpretation

Research), certification and training, an association store, a publishing imprint (InterpPress), digital newsletters and web-based services. The website includes the Green Pages interpretive service providers directory, blogs on interpretive planning and graphic design and the Definitions Project list of interpretive term definitions.

Visitor Studies Association

http://visitorstudies.org/

VSA is an international network of professionals committed to understanding and enhancing visitor experience in informal learning settings through research, evaluation and dialogue. Besides valuable information on conducting visitor studies, the website includes a “Find an Evaluator” database

APPENDIX E:

PLANNING CHECKLISTS

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Why Is this Plan Needed?

Consider the value of the following to the park:

- ☐ Follow-up to higher level planning
- ☐ Seeking additional funding
- ☐ No interpretation available
- ☐ Preservation of park resources
- ☐ Significance of the resources
- ☐ Principal park themes not met
- ☐ Orientation to new areas needed
- ☐ Out-of-date interpretation
- ☐ Worn-out facilities
- ☐ No facilities or inadequate facilities
- ☐ Old technologies
- ☐ Visitors aren't interested in current interpretation
- ☐ New information available
- ☐ Facilities improved/expanded
- ☐ New funding available
- ☐ Visitation/visitors have changed
- ☐ Long-term priority for park
- ☐ Growing interest in subject
- ☐ Recently acquired collections
- ☐ Recently acquired property, building, or site
- ☐ Travelling exhibit to highlight park
- ☐ Program or exhibition to complement travelling exhibit
- ☐ Program or project will attract new visitors
- ☐ Public safety concerns
- ☐ Park resources not accessible
- ☐ New technology available
- ☐ Project to complement staff activities
- ☐ Program to complement project
- ☐ Staff availability
- ☐ Anniversary date of an event
- ☐ Political priority
- ☐ Change in park use patterns

Planning Budget

Consider which of the following must be included in the planning budget:

- ☐ Planning team salary and benefits
- ☐ Public and stakeholder outreach, including newsletters and other mailings, meeting supplies (don't forget snacks and drinks), meeting room rental, posters and handouts for meetings
- ☐ Visitor studies
- ☐ Planning team travel and per diem
- ☐ Graphic design
- ☐ Illustration, including bubble diagrams and concept sketches
- ☐ Photography
- ☐ Cartography
- ☐ Software for document layout
- ☐ Printing and binding

Assembling a Team

Consider the individuals who will provide:

- ☐ Leadership/coordination
- ☐ Subject area expertise
- ☐ Research
- ☐ Interpretive planning
- ☐ Media planning
- ☐ Architectural planning
- ☐ Landscape planning
- ☐ Public meetings facilitation
- ☐ Registration
- ☐ Curatorial analysis
- ☐ Interpretive plan writing
- ☐ Interpretive plan graphic design
- ☐ Furnishing plan writing
- ☐ Graphics inventory
- ☐ Artifacts/art acquisition
- ☐ Design
- ☐ Working drawings
- ☐ Copyright research
- ☐ Budgeting
- ☐ Exhibit plan specifications
- ☐ Text writing
- ☐ Taxidermy
- ☐ Computer programming
- ☐ Reproductions & equivalents list
- ☐ Mounted specimens searches
- ☐ Cataloging artifacts
- ☐ Acquisition & purchasing
- ☐ Security planning
- ☐ Contract development
- ☐ Contract management
- ☐ Facilities development
- ☐ Construction & installation
- ☐ Artifact conservation
- ☐ House museum installation
- ☐ Audiovisual production
- ☐ Teachers' guides & packets
- ☐ Brochures, exhibit catalogs
- ☐ Fund raising
- ☐ Public relations
- ☐ Promotional events
- ☐ Follow-up evaluation
- ☐ Warranty work
- ☐ Revisions to the project

Assembling a Team (continued)

Be sure to discuss the project with the following individuals:

- ☐ Park superintendent
- ☐ Visitor services staff
- ☐ Park visitors
- ☐ Cooperating association
- ☐ All staff
- ☐ Park interpreters
- ☐ Curator, collections manager
- ☐ Special interest groups
- ☐ Organizations providing funding
- ☐ Historians
- ☐ Biologists
- ☐ Archeologists
- ☐ Recreation specialists
- ☐ Maintenance staff
- ☐ Ethnic/cultural group representatives
- ☐ Media experts
- ☐ Landscape architects
- ☐ Disabled community representatives
- ☐ Conservators
- ☐ Designers/artists
- ☐ Educators
- ☐ Docents/volunteers
- ☐ Adjacent landholders
- ☐ Interested public
- ☐ Staff in related agencies
- ☐ Chamber of Commerce

Planning Documents

Review:

- ☐ General Plan
- ☐ Interpretive Prospectus
- ☐ General Plan Amendment(s)
- ☐ Interpretation Master Plan
- ☐ Interpretation Action Plan
- ☐ Management goals and practices
- ☐ Department Administrative Manual
- ☐ Department Operations Manual
- ☐ Departmental Notices
- ☐ State Parks System Plan
- ☐ The Seventh Generation
- ☐ Scope of Collections statement
- ☐ Previous interpretive plans
- ☐ Old furnishing plans
- ☐ Earlier interpretive services plans
- ☐ Feasibility studies
- ☐ Historic structure reports
- ☐ Resource inventory(ies)
- ☐ Unit histories
- ☐ Cooperating association plans
- ☐ City/county general plans

References and Resources

Determine what resources will provide information about your subject area:

- ☐ Department resource inventories
- ☐ Historic structures reports
- ☐ Special studies
- ☐ Archaeological reports
- ☐ Photographic albums
- ☐ Archival materials
- ☐ Museum collections
- ☐ Recreational opportunities
- ☐ Natural histories
- ☐ Patterns, cycles, processes
- ☐ Adaptations, interactions, behaviors
- ☐ Cultural histories
- ☐ Landscape features
- ☐ Historic structures
- ☐ Books, professional journals, other publications
- ☐ Diaries
- ☐ Historic graphics
- ☐ Recent photographs
- ☐ Existing exhibits
- ☐ Field notes
- ☐ Controversial issues
- ☐ Institutions with pertinent collections
- ☐ Resource people*
- ☐ Oral histories
- ☐ Correspondence files
- ☐ Internet
- ☐ Previous land owners
- ☐ WPA reports
- ☐ Unit files
- ☐ Unit history
- ☐ Long-time park users

**includes knowledgeable park staff and retired employees.*

Existing Interpretation and Education

Consider the following when documenting existing interpretation and education. This list is not exhaustive, but will give you an idea of the wide variety of interpretation and education that may occur in a park:

- ☐ Environmental education programs
- ☐ School group tours
- ☐ Junior Ranger Programs
- ☐ Junior Lifeguard Programs
- ☐ Environmental Living Programs
- ☐ Environmental Studies Programs
- ☐ Publications such as brochures and booklets
- ☐ Off-site outreach programs
- ☐ Web-based education
- ☐ Distance-learning programs
- ☐ College classes in the field
- ☐ Lifelong learning institutes
- ☐ Elderhostels
- ☐ Internships
- ☐ Service learning
- ☐ Docent training
- ☐ Lecture series
- ☐ Living history programs
- ☐ Self-guided trail
- ☐ Scout programs
- ☐ Campfire talks
- ☐ Staged dramatic programs
- ☐ Guided tours and hikes
- ☐ Living history presentations
- ☐ Park special events
- ☐ Formal exhibits
- ☐ Historic setting exhibits
- ☐ Dioramas
- ☐ Interpretive boardwalk/trail
- ☐ Individual interpretive panels
- ☐ Hands-on, discovery areas
- ☐ Period participatory activities
- ☐ Audio tours (cellphone, mp3 player, wand, etc.)
- ☐ Smartphone/tablet computer tours
- ☐ Built-in electronic activities/games
- ☐ Audiovisual presentations
- ☐ Live stage productions
- ☐ Demonstrations
- ☐ Travelling exhibits
- ☐ Website and apps
- ☐ Smartphone/tablet computer apps such as scavenger hunts and other games
- ☐ Concessionaire-provided interpretation and education
- ☐ Other third-party-provided interpretation and education

Related Resources and Interpretation

Check with:

- ☐ Local visitor bureau
- ☐ Existing museums
- ☐ Local historical societies
- ☐ Local, government operated parks
- ☐ Commercial parks
- ☐ Zoos
- ☐ Commercial tours
- ☐ Concessions
- ☐ National forests
- ☐ National parks
- ☐ California Department of Fish and Game
- ☐ Other federal agencies (e.g. BLM, Corps of Engineers, Fish and Wildlife, NOAA)
- ☐ Other state parks
- ☐ Other community programs/events
- ☐ City government
- ☐ County government
- ☐ Other state agencies
- ☐ Colleges/universities
- ☐ Environmental education day programs and camps
- ☐ Nonprofit groups
- ☐ Botanical gardens
- ☐ Science centers
- ☐ Resource centers

Demographic Data Sources

Check the following for demographic data:

- ☐ U.S. census data
  http://www.census.gov/main/www/access.html
- ☐ California Department of Finance Demographic Research Unit data
  http://www.dof.ca.gov/research/demographic/
- ☐ California Travel and Tourism Commission
  http://industry.visitcalifornia.com/Research/
- ☐ Other states' tourism bureaus
- ☐ County or local visitor bureaus
- ☐ Chambers of commerce
- ☐ Local planning commissions
- ☐ County offices of education
- ☐ School districts
- ☐ Local foundations and businesses
- ☐ Other local recreation and history organizations

Park Visitors' Profiles

Define your park's actual, potential, and target audiences in terms of these factors:

- ☐ Interests
- ☐ Resource familiarity
- ☐ General ages
- ☐ Time availability
- ☐ Social context of their visit
- ☐ Mobility patterns
- ☐ Socio-economic background
- ☐ Income
- ☐ Male/female ratio
- ☐ Proximity of residence to park
- ☐ Access to the park
- ☐ Motivation for coming
- ☐ Use of leisure time
- ☐ Relationship to subject matter
- ☐ School use
- ☐ Education levels
- ☐ Educational needs
- ☐ Language skills
- ☐ Disabilities
- ☐ Ethnic/cultural identities
- ☐ Informal group size and composition*
- ☐ Organized groups using the park**
- ☐ Non-English speakers
- ☐ Foreign visitors
- ☐ Fee resistance

**Informal groups may include: couples, families (note typical ages of children), extended families, friends. Also note the prevalence of lone visitors.*

***Organized groups may include: family reunions, bus tour companies, day camps, scouting organizations, clubs, churches, fraternal organizations, historical societies, etc.*

Limitations to Access

What factors might restrict or affect passage to or through any of the proposed facilities or activities?

- ☐ Weather
- ☐ Architectural barriers
- ☐ Floor loadings
- ☐ Ceiling heights
- ☐ Power supply
- ☐ Environmental conditions
- ☐ Historic structure
- ☐ Natural barriers
- ☐ Visitor disabilities*
- ☐ Subject matter
- ☐ Ongoing construction
- ☐ Ongoing archeological excavations
- ☐ Habitat sensitivity
- ☐ Environmental concerns
- ☐ Language barriers
- ☐ Lack of staff
- ☐ Transportation
- ☐ Communication methods
- ☐ Nearby parking
- ☐ Restrooms
- ☐ Entrance fee
- ☐ Physical risk
- ☐ Equipment
- ☐ Lack of outreach
- ☐ Remoteness
- ☐ Staff uninformed
- ☐ Security
- ☐ Periodic flooding

**See next section: Universal Access or Other Alternatives*

Universal Access or Other Alternatives

Consider how each of the following might impact your audience:

- ☐ Signs
- ☐ Walkways, ramps, stairs, rails
- ☐ Light levels
- ☐ Counter and exhibit heights
- ☐ Type style and size
- ☐ Lack of film captioning (see sidebar)
- ☐ Braille text
- ☐ Assistive listening devices and other aids
- ☐ Accessibility levels posted
- ☐ Surfaces—flooring, paths, trails
- ☐ Printed scripts of AV programs
- ☐ Large print publications
- ☐ Alternative media*
- ☐ Parking for disabled visitors
- ☐ Easy access to public transportation
- ☐ Seating meeting ADA standards
- ☐ Talking maps
- ☐ Text telephones (TDDs)
- ☐ Drinking fountains, restrooms
- ☐ Shade-covered areas
- ☐ Staff sensitive to hidden disabilities
- ☐ Outreach to disabled communities
- ☐ Exhibit text in other languages
- ☐ Brochures/booklets in other languages

FILM CAPTIONING

Film captioning is not listed as an accessibility item to consider adding because in accordance with the Tucker decision all films show in California State Parks MUST be open-captioned. For more information, contact the Accessibility Unit.

**Alternative media developed specifically for visitors with disabilities: interpretive walks, talks, demonstrations, Braille publications, large print publications, captioning, assistive listening devices, audio tours*

Universal Access or Other Alternatives (continued)

Consider this equipment to increase accessibility:

- ☐ Assistive listening devices
- ☐ Magnifiers
- ☐ TDDs (telecommunications devices)
- ☐ Captioning for films
- ☐ Audio tours
- ☐ Audiovisual equipment
- ☐ Tactile relief maps
- ☐ Talking maps
- ☐ Models
- ☐ Computer stations
- ☐ Mannequins
- ☐ Wireless, infared equipment
- ☐ Other languages

Revenue Generation and Alternative Facility Uses

Consider the following revenue sources or alternate uses:

- ☐ Entrance-fee collection
- ☐ Performance venues
- ☐ Concession-operated store
- ☐ Cooperating association sales
- ☐ Receptions
- ☐ Banquets, dinners, potlucks
- ☐ Concerts
- ☐ Music festivals
- ☐ Athletic events
- ☐ Folk-life festivals
- ☐ Competitions
- ☐ Demonstrations
- ☐ Film festivals
- ☐ Art festivals
- ☐ Carnivals
- ☐ Handcraft fairs
- ☐ Farmer's market
- ☐ Orange festival
- ☐ Birding/whale festivals
- ☐ Parades
- ☐ Old-timers' day
- ☐ Ethnic programs
- ☐ Holiday festivals
- ☐ Fandangos
- ☐ Antique machinery demonstrations
- ☐ Storytelling activities
- ☐ Bird watching events
- ☐ Eagle tours
- ☐ Fall flyway festivals
- ☐ Bat flight breakfast
- ☐ Geology walks
- ☐ Cemetery tours
- ☐ Flower festivals
- ☐ Horse-drawn vehicle activities
- ☐ Holiday special events
- ☐ Harvest fairs
- ☐ Jazz festivals
- ☐ Staged plays and programs
- ☐ Fishing derbies
- ☐ Food festivals
- ☐ Commercial tours
- ☐ Training programs
- ☐ Candlelight tours
- ☐ Smartphone tours and apps
- ☐ Astronomy/star talks
- ☐ Native American big times
- ☐ Weddings
- ☐ Radio or television events
- ☐ Dramatic presentations
- ☐ Special exhibitions
- ☐ Fee-based interpretation*
- ☐ Souvenir replicas

**Fee-based interpretation may include any value-added programs: walking tours, bus tours and other special request tours, seminars and other programs, environmental education, special events (e.g. artists in the park, music festivals, living history weekends, field seminars with guest speakers, "behind-the-scenes" tours, etc.).*

Revenue Generation and Alternative Facility Uses (continued)

- ☐ DVDs
- ☐ CDs
- ☐ Publications, postcards
- ☐ Posters, maps
- ☐ Web-based sales
- ☐ Interpretive concession
- ☐ Convention site
- ☐ Organizational meetings
- ☐ Fundraising events
- ☐ Film locations
- ☐ Host for conference/workshops
- ☐ Exhibition previews
- ☐ Informal education programs
- ☐ Craft exhibitions
- ☐ Dance performances
- ☐ Demonstrations of museum skills
- ☐ Training events for park professionals
- ☐ Cook-offs
- ☐ Corporate team-building or offsite meeting venue
- ☐ Rental space

Safety and Security

Identify potential risk factors for your project:

- ☐ Lack of environmental controls
- ☐ Cleaning practices
- ☐ Tripping hazards
- ☐ Hanging objects and rigging
- ☐ Heights of overhangs
- ☐ Counter heights
- ☐ Sharp corners
- ☐ Sharp objects
- ☐ Glazing materials
- ☐ Lighting—too bright or too dim
- ☐ Open flames, fire
- ☐ Electrical safety
- ☐ Animal bites, stings, etc.
- ☐ Hot objects
- ☐ Fragility of objects
- ☐ Instability of interpretive objects
- ☐ Value of items on display
- ☐ Slippery surfaces
- ☐ Height of stairways and ramps

Methods for mitigating threats to safety and security:

- ☐ Security for collections storage
- ☐ Secure large objects
- ☐ Safeguard all objects
- ☐ Photo documenting inventory
- ☐ Daily "walk-throughs"
- ☐ Building occupancy limits
- ☐ Safety and directional signs
- ☐ Sound control
- ☐ Available first aid kit
- ☐ Emergency plan in place
- ☐ Risk management plan in place
- ☐ Security guard
- ☐ First aid/safety training for staff
- ☐ Opening/closing procedures
- ☐ Cash-handling procedures
- ☐ Intrusion alarms
- ☐ Vandalism
- ☐ Defensive plants
- ☐ Available phone or radio
- ☐ Background checks
- ☐ Access to sheriff's office
- ☐ Insurance for special events/filming
- ☐ Emergency notification guide

Safety and Security (continued)

Double check your project plans to ensure that (where appropriate):

- ☐ Warning signs and protection are provided where hazards cannot be avoided.
- ☐ The facilities prevent resource damage.
- ☐ New facilities do not unnecessarily displace or impact fragile environments or native species.
- ☐ Trail or exhibit clearances provide for the safe movement and accommodation of all visitors.
- ☐ Signs and exhibits are constructed for security, but can also be easily accessed for maintenance by staff.
- ☐ Fixtures and object supports are physically safe for both objects and visitors alike.
- ☐ Objects are mounted in such a way that they will not be physically altered or damaged.
- ☐ Methods used for display are good conservation practices.
- ☐ Objects are used in such a manner that it will not harm them, wear them out, or cause environmental damage.
- ☐ Where critical, objects are placed in a controlled environment (controlled humidity, heat, and light) that limits their degradation.
- ☐ Touchable objects—used in hands-on, discovery areas, are supervised. (Working parts must be easily replaced, if they wear out.)
- ☐ Working exhibits can be operated safely and not pose a hazard for visitors.
- ☐ The interpretive facility complies with public health and safety regulations and *California State Parks Accessibility Guidelines.*
- ☐ The Interpretive Plan implements fire marshal recommendations and complies with the fire code.

Related Use of a Space/Facility

Checklist:

- ☐ Contact station
- ☐ Security area
- ☐ Guest book/register
- ☐ Suggestion box
- ☐ Temporary exhibits
- ☐ Travelling/changing exhibitions
- ☐ Collections storage
- ☐ Storage for sales area
- ☐ Volunteer storage space
- ☐ Restrooms
- ☐ Research area
- ☐ Library and archives
- ☐ Auditorium
- ☐ Lounge for staff and volunteers
- ☐ Audiovisual area
- ☐ Scientific laboratory
- ☐ Insect zoo
- ☐ Discovery room
- ☐ Planetarium
- ☐ Interpretive garden
- ☐ Nature trail
- ☐ Boardwalk/overlook
- ☐ Art gallery
- ☐ Aquarium
- ☐ Staff offices
- ☐ Conference room/staff training room
- ☐ Classroom
- ☐ Conservation laboratory
- ☐ Living history programs
- ☐ Demonstration area(s)
- ☐ Historic re-enactments
- ☐ Workroom
- ☐ Exhibit design and construction shop
- ☐ Period craft work areas
- ☐ Chautauqua stage
- ☐ Food service
- ☐ Kitchen/catering facilities
- ☐ Interpretive sales/gift shop
- ☐ Cooperating association office
- ☐ Cooperating association storage
- ☐ Janitorial office
- ☐ Janitorial storage area and sink
- ☐ Picnic area
- ☐ Special events activities area
- ☐ Rest area for visitors
- ☐ Baby-changing facilities
- ☐ Laundry facilities
- ☐ Living history storage space
- ☐ Junior Rangers storage
- ☐ Junior Lifeguard storage

Staffing Considerations

Consider these personnel, their roles, and responsibilities:

- ☐ Cashier/fee collector
- ☐ Housekeeper
- ☐ Maintenance staff
- ☐ Guide
- ☐ Custodian
- ☐ Grounds keeper
- ☐ Archaeologist
- ☐ Paleontologist
- ☐ Historian
- ☐ On-site conservator
- ☐ Park ranger
- ☐ Museum director
- ☐ Curator
- ☐ Interpreter
- ☐ Museum technician
- ☐ Archivist/librarian
- ☐ Restoration specialist
- ☐ Volunteer coordinator
- ☐ Docents/volunteers
- ☐ Bookstore management staff
- ☐ Security guard
- ☐ Public relations/marketing staff
- ☐ Park aid
- ☐ Trainers/teachers
- ☐ Audiovisual specialist
- ☐ Information technology specialist

Public Involvement

Methods for involving the community:

- ☐ Public meetings
- ☐ Public feedback on prototypes,
- ☐ Mock-ups
- ☐ Organizational meetings
- ☐ Interested constituents
- ☐ Contact recognized experts
- ☐ Workshops
- ☐ Response cards
- ☐ Comment books
- ☐ Sign-up list
- ☐ Bulletin board
- ☐ Internet survey
- ☐ Email
- ☐ Letters
- ☐ Informal observation
- ☐ Informal conversations
- ☐ Educational organizations
- ☐ Visitor surveys
- ☐ Newsletter
- ☐ Media releases
- ☐ Public service announcements
- ☐ Education stations on cable
- ☐ Speakers for service groups
- ☐ Consultants from ethnic communities

Selecting Media

Check the potential for the following media in your project:

- ☐ Guided tours
- ☐ Living histories
- ☐ Formal exhibits
- ☐ Historic setting exhibits
- ☐ Dioramas
- ☐ Interpretive boardwalk/trail
- ☐ Hands-on, discovery areas
- ☐ Audio-tours
- ☐ Smartphone/tablet computer tours
- ☐ Built-in electronic activities/games
- ☐ Videos/films
- ☐ Large-screen film (e.g., Imax)
- ☐ Environmental Living Programs
- ☐ Environmental Studies Programs
- ☐ Live stage productions
- ☐ Demonstrations
- ☐ Junior Ranger Programs
- ☐ Junior Lifeguard Programs
- ☐ Travelling exhibits
- ☐ Outreach exhibits/activities, including website and apps
- ☐ Music
- ☐ Publications
- ☐ Smartphone/tablet computer apps such as scavenger hunts and other games

K-12 Education Considerations

Consider:

- ☐ California and common core education standards
- ☐ Science, Technology, Engineering and Math (STEM) initiatives
- ☐ Tie-ins to Education and the Environment Initiative (EEI) curriculum units
- ☐ Environmental education programs
- ☐ School group tours
- ☐ Junior Ranger Programs
- ☐ Junior Lifeguard Programs
- ☐ Environmental Living Programs
- ☐ Environmental Studies Programs
- ☐ Publication projects
- ☐ Outreach programs
- ☐ Web-based education
- ☐ Distance-learning programs

Considerations for Adult Learning Programs

Consider:

- ☐ College classes in the field
- ☐ Lifelong Learning Institutes
- ☐ Elderhostels
- ☐ Internships
- ☐ Service learning
- ☐ Docent training
- ☐ Lecture series
- ☐ Living history programs
- ☐ Self-guided brochure
- ☐ Scout programs
- ☐ Campfire talks
- ☐ Staged dramatic programs
- ☐ Publication projects
- ☐ Outreach programs

Project Budget

What facets of the project's development need to be budgeted?

- ☐ Salaries and wages
- ☐ Shipping/travel
- ☐ Artifact acquisition
- ☐ Storage during development
- ☐ Architectural work
- ☐ Building modifications
- ☐ Landscaping
- ☐ Design development
- ☐ Equipment purchases
- ☐ Fabrication
- ☐ Installation
- ☐ Graphics reproduction
- ☐ Copyright permission costs
- ☐ Public meetings
- ☐ Mounted specimens acquisition
- ☐ Marketing and promotion
- ☐ Contract management

How is the project to be funded?

- ☐ Fully funded
- ☐ Partially funded
- ☐ Marketing campaign planned
- ☐ Federal or state grant
- ☐ Individual gift
- ☐ Cooperating association funds
- ☐ Corporate sponsor
- ☐ Self-supported
- ☐ Local foundation
- ☐ Civic organization support
- ☐ Municipal, county, or state taxes
- ☐ Bond act

Consider the long-range implications for maintaining and operating the proposed project:

- ☐ Staff salaries
- ☐ Rent
- ☐ Utilities
- ☐ Program costs
- ☐ Updating exhibits
- ☐ Maintenance
- ☐ Outreach
- ☐ Updating equipment

Program Budget

What facets of the program's development need to be budgeted?

- ☐ Salaries and wages
- ☐ Shipping/travel
- ☐ Hands-on object purchases
- ☐ Equipment purchases
- ☐ Demonstration tool purchases
- ☐ Period clothing purchases
- ☐ Natural history specimen purchases
- ☐ Curriculum development
- ☐ Participant materials development (e.G. Teacher's handbook, program handouts and activity sheets)
- ☐ Graphics reproduction
- ☐ Copyright permission costs
- ☐ Public meetings
- ☐ Marketing and promotion
- ☐ Contract management

Consider the long-range implications for maintaining and operating a proposed interpretive service:

- ☐ Staff salaries
- ☐ Rent
- ☐ Utilities
- ☐ Program consumable materials
- ☐ Program tool replacement
- ☐ Volunteer training costs
- ☐ Program administration costs
- ☐ Updating exhibits
- ☐ Exhibit repair
- ☐ Maintenance
- ☐ Outreach
- ☐ Updating equipment
- ☐ Equipment repair

Program Budget (continued)

How is the program to be funded?

- ☐ Fully funded
- ☐ Partially funded
- ☐ Marketing campaign planned
- ☐ Federal or state grant
- ☐ Individual gift
- ☐ Cooperating association funds
- ☐ Corporate sponsor
- ☐ Self-supported (fee-based interpretation)
- ☐ Local foundation
- ☐ Civic organization support
- ☐ Municipal, county, or state taxes
- ☐ Bond act

Interpretive Objects

How will objects be used:

- ☐ Hands-on, discovery areas
- ☐ Visible storage
- ☐ Living history programs
- ☐ Travelling exhibits
- ☐ Outreach programs
- ☐ Computer/internet displays
- ☐ Formal exhibit cases
- ☐ "Suitcase exhibits"/"travelling trunks" for schools
- ☐ Research
- ☐ Replica sales
- ☐ Indoors
- ☐ Outdoors
- ☐ House museums
- ☐ Historic setting exhibits
- ☐ Photographic displays
- ☐ Demonstrations---public, scouts, schools
- ☐ Environmental living programs
- ☐ Guided tours
- ☐ Exhibit van/trailer
- ☐ Illustrations in publications
- ☐ In audiovisual programs

Graphics

Explore the following sources for graphics. See also Appendix B, "Selected Research Institutions and Websites."

Many of these sources have excellent websites where you can search for graphics in their catalogs, and often see a low-resolution image of the graphic. Quite a few of the California institutions participate in the Online Archives of California (OAC), where you can search through multiple institutions' catalogs at the same time. Remember, though, that desirable graphics may not yet be scanned and visible online, or included in online searchable catalogs. Also check with individual institutions to find out what may be available in person.

- ☐ California State Parks Photographic Archives
- ☐ California State Parks Archives
- ☐ The Bancroft Library, UC Berkeley (on OAC)
- ☐ Henry E. Huntington Library
- ☐ California State Library
- ☐ Other college & university libraries[1]
- ☐ Library of Congress
- ☐ Individual California state parks' libraries and archives[2]
- ☐ Public libraries[3]
- ☐ Private libraries and archives[4]
- ☐ California State Archives
- ☐ National Archives
- ☐ California Historical Society
- ☐ Other historical societies[5]
- ☐ The Oakland Museum of California
- ☐ Historical museums[6]
- ☐ Natural history museums
- ☐ Government agencies
- ☐ College & university departments
- ☐ College & university archives
- ☐ Private collections
- ☐ Smithsonian Institution
- ☐ National Park Service
- ☐ United States Geological Survey
- ☐ National Geographic Society
- ☐ American Film Institute
- ☐ Commercial archives/ collections[7]
- ☐ Business & corporate archives8
- ☐ Publishers
- ☐ Newspapers
- ☐ Churches
- ☐ Art museums & galleries
- ☐ Internet
  - ☐ Online Archive of California (includes images from many participating institutions) (http://www.oac.cdlib.org/)
  - ☐ CalPhotos (especially good for animals and native plants, also includes some historic images, people and landscapes) (http://calphotos.berkeley.edu/)

Graphics (continued)

Examples:

1 UC Davis Shields Library, Stanford University Special Collections, Beinecke Rare Book and Manuscript Library at Yale University

2 California State Railroad Museum Library & Archives, Marshall Gold Discovery SHP library, Big Basin Redwoods State Park archives

3 San Francisco Public Library, Denver Public Library, New York Public Library

4 Society of California Pioneers

5 American Antiquarian Society, Worcester, Mass.; Chicago Historical Society; New York Historical Society; Oregon Historical Society; San Diego Historical Society

6 Amon Carter Museum, Fort Worth, Texas; Buffalo Bill Historical Center, Cody, Wyoming; Henry Francis duPont Winterthur Museum, Wilmington, Delaware; Los Angeles County Museum of Natural History; Mystic Seaport; The Gilcrease Museum; Shelburne Museum; Southwest Museum; The Museums at Stony Brook

7 Bettmann Archive, Culver Pictures, Pat Hathaway Collection, Time-Life

8 Wells Fargo Corporate Archives, Sunkist Growers

Modifications to the Building or Setting

Checklist:

- ☐ Provide access with the least impact to the resources and structures.
- ☐ Offer alternative methods of access for inaccessible areas.
- ☐ Limit structural changes.
- ☐ Document modifications.
- ☐ Be aware of safety considerations and health hazards.
- ☐ Assign and adhere to load limits in buildings.
- ☐ Preserve the viewshed.
- ☐ Preserve the historic landscape.
- ☐ Complete California Environmental Quality Act (CEQA) review.
- ☐ Complete 5024 review.

Design Concepts

Consider these factors in your project design:

- ☐ The nature of the audience
- ☐ Level of visitor interaction
- ☐ *California State Parks Accessibility Guidelines*
- ☐ Space requirements for visitor motion and comfort
- ☐ Durability
- ☐ Ease of upkeep
- ☐ Attractiveness to visitors
- ☐ Limiting text to maintain interest
- ☐ Elements that will tantalize or provoke visitors
- ☐ Avoidance of “trendy” colors and typestyles
- ☐ Flexibility for future changes
- ☐ Light levels and their effect on artifacts and the audience

Supplementary Interpretive Activities

Supplementary activities might include:

- ☐ Pre-visit activities for school groups
- ☐ Teacher's guides and materials
- ☐ Post-visit activities for school groups
- ☐ Suggested reading lists
- ☐ Suggested website lists
- ☐ Brochures
- ☐ Guidebooks
- ☐ Websites
- ☐ Smartphone apps
- ☐ Lectures
- ☐ Demonstrations
- ☐ Period participatory activities
- ☐ Puppet programs
- ☐ Workshops
- ☐ Discovery areas
- ☐ Living history programs

Evaluating/Measuring Success

To check if project or program learning objectives are being met, consider the following:

- ☐ Include questions that test understanding as part of the program or interactive exhibits, track results
- ☐ Interview visitors before and after the interpretive experience, analyze change in knowledge and attitudes.

To solicit visitor feedback, consider the following:

- ☐ Comment forms
- ☐ Survey cards
- ☐ Comment book/visitor register
- ☐ Interviews
- ☐ Letters
- ☐ Personal contacts
- ☐ Suggestion boxes
- ☐ Visitor surveys

Demonstrations

Possible demonstrations might include:

- ☐ Animal husbandry
- ☐ Archaeology
- ☐ Assaying
- ☐ Basket making
- ☐ Beer brewing
- ☐ Blacksmithing
- ☐ Bread making and baking
- ☐ California indian skills and crafts
- ☐ Candle and soap making
- ☐ Carpentry
- ☐ Carving
- ☐ Cooper work
- ☐ Dancing
- ☐ Equipment restoration
- ☐ Farrier work
- ☐ Flint knapping
- ☐ Fly tying
- ☐ Fire starting without matches
- ☐ Fishing
- ☐ Food preparation
- ☐ Foundry work
- ☐ Freight packing
- ☐ Furniture making
- ☐ Gambling games
- ☐ Harnessing horses or oxen
- ☐ Harvesting
- ☐ Horticultural practices
- ☐ Historic sign painting
- ☐ Leather working
- ☐ Military drills
- ☐ Millinery
- ☐ Mining and mining equipment
- ☐ Navigational instruments
- ☐ Painting landscapes
- ☐ Period construction techniques
- ☐ Period music and instruments
- ☐ Period photography
- ☐ Saddle and harness manufacturing
- ☐ Sewing and embroidery
- ☐ Shoe- and bootmaking
- ☐ Sign painting
- ☐ Spinning
- ☐ Spring cleaning
- ☐ Steam engines
- ☐ Stone sculpting
- ☐ Storytelling
- ☐ Telegraph
- ☐ Timber cutting
- ☐ Tinsmithing
- ☐ Toy making
- ☐ Typesetting and printing
- ☐ Wagonwright work
- ☐ Water-powered equipment
- ☐ Weaving

Period Participatory Activities

Period participatory activities that re-create historic activities include:

- ☐ Billiards
- ☐ Bowling
- ☐ Bread making
- ☐ Candy making
- ☐ Care of animals
- ☐ Riding carriages, wagons and horses
- ☐ Children's games
- ☐ Clothing construction
- ☐ Dancing
- ☐ Farm chores
- ☐ Flint knapping
- ☐ Fly tying and fishing
- ☐ Food preparation
- ☐ Gambling games
- ☐ Gardening
- ☐ Indian hand games
- ☐ Military drills
- ☐ Mining methods
- ☐ Musical performances
- ☐ Needle crafts
- ☐ Painting and fine arts
- ☐ Period holiday activities
- ☐ Period plays and pageants
- ☐ Retail merchant activities
- ☐ Rope making
- ☐ School sessions
- ☐ Singing
- ☐ Spring cleaning
- ☐ Tin working
- ☐ Toy and puzzle making

Appendix F:

INTERPRETIVE PROJECTS COSTS AND TIME

(rev. 1/4/10)

How to Use the Chart:

The chart on the following pages is intended to help staff estimate the costs and time requirements of various types of interpretive projects. It should be used as a starting point only, and it is expected that additional research will be needed to create a realistic estimate for a specific project. Approximate costs on this chart are given as a range that represents an average of possible costs, so your project may be within, or above or below, this range based on the many variables that come into play for each of these types of projects. Examples of such variables include the amount of work done in preparation for the project, the amount of Department staff time available to work on the project, the scope and complexity of the project, and other factors that will affect the actual cost. This chart was developed in 2010, so you will also need to adjust for inflation. For referrals to Department staff who can help in estimating costs for a specific project contact a Service Center or the Interpretation and Education Division.

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Plans (costs will vary based on scope of plan, size of park and its resources and research needed; costs do not include printing and binding but do include research)			
Interpretive Prospectus	Create when there is no general plan or unit has an old general plan that doesn't provide adequate guidance for interpretation	$60,000 - $90,000	9 months
Interpretation Master Plan	Might also be called the "Study Phase;" may be created by consultant with staff guidance and oversight	$75,000 - $100,000	7 months
Interpretation Action Plan	Should not be produced under contract; needs to be created by department staff in consultation with stakeholders	Minimal cost beyond staff time for stakeholder meeting supplies	2 months
Interpretive Project Plan	Might also be called the "Preliminary Plan Phase"	10 - 15% of total project budget	6 months
Interpretive Program Plan		$15,000 - $25,000	6 months
Interpretive Landscape Plan		$40,000 - $60,000	6 months
Furnishing Plan	Costs are for plan only; see below for costs related to furnishings purchase and installation	$30,000 - $50,000	6 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Wayside Panels and Housing (costs assume installation will be done by existing staff)			
Interpretive panel through Park Panel Program	Housing for panel not included	$300 - $500	3 months
Replacement of Existing Panel	Includes redesign of panel and fabrication, but not new research or writing. Housing for panel not included	$3,000 - $5,000	5 months
New Panel, non-tactile	Includes research Housing for panel not included	$10,000 - $12,000	8 months
Tactile elements for new panel, additional cost and time.	Includes research This cost is for tactile elements only—should be added to panel cost	$1,500 - $3,500	4 months
Wayside Shelter	Does not include panel(s) to go in shelter	$1,000 - $2,500	6 months
Interpretive Panel Base or Support Posts and Frame	Does not include panel to go on base/posts or in frame	$550 - $700	2 months
Exhibits			
Visitor Center Exhibit	Includes design, fabrication and installation, but not planning	$500 - $750 per sq ft	18 months
Historic Furnishings	Includes purchase and installation, but not planning	$400 - $650 per sq ft	10 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Dimensional Interpretive Map	Housing for map not included	$20,000 - $30,000	6 months
Models/Tactile Exhibits	Custom-made; does not include artwork, if needed	$250 - $500 per sq ft	6 months
Mannequins/ 3-dimensional Human Figures	High-quality, including costuming.	$10,000 - $15,000	6 months
Replica Animal Skeletons	Off-the-shelf. Limited species available. Large price range based on size, complexity, availability.	$500 - $10,000	1 month
Taxidermy	Standard mount. You supply the animal. Prices vary by size and difficulty. Realistic models often preferable; see below.	$300 - $10,000	6 months
3-D Touchable Models	Includes drawing, sculpture, painting, finishing, project management, crating, shipping and tax Varies widely by size and complexity (example range is for field mouse or garibaldi to golden eagle) Realistic models often preferable to taxidermy (easier care, touchable)	$2,500 - $18,000	6 months
Public Works Projects			
Campfire Center Rehabilitation	Includes public works, video equipment, screen, booth, seating, sound equipment	$250,000 - $450,000	9 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Visitor Center Theater Rehab	Includes public works (interior finishing only), video equipment, screen, booth, stackable chairs, sound equipment. Does not include media to be shown in theater, stage, podium, lighting or custom cabinetry.	$60 - $85 per sq ft	9 months
Interpretive Trail with Panels	Includes trail built to ADA standards ($250,000 per mile), and 10 panels and frames for approx $12,500 each Trail building costs vary dramatically based on terrain, soil, and water crossings—could cost more than cost shown here (estimate very high if terrain is steep, marshy or otherwise difficult) Ideally, plan actual route and develop more accurate estimate based on plan Does not include planning costs	$250,000 - $500,000 per ½ mile	16 months
PORTS Studio	Studio developed from existing room Start-up costs include all electronic equipment, soundproofing, blue/green screen, professionally-developed unit of study Ongoing costs include equipment maintenance and the cost of an Interpreter I position to coordinate the program at the park	$137,000 first year, $87,000 ongoing annual costs	8 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Media			
Teacher's Guide	Includes development costs, but not production (which will vary based on media and quantity)	$25,000 - $50,000	6 months
A/V Program	Includes research, writing and production	$15,000 - $25,000 per min	10 months
Brochure (small, 11" x 17")	Includes research, writing, design (done in-house by the Publications Section), and printing of 50,000 copies (estimated 3-year supply) Does not include cartography or photo costs	Research, writing, design: $2,000 - $3,000 Printing: $6,500	4 months
Brochure (large, 17" x 22")	Includes research, writing, design (done in-house by the Publications Section), and printing of 50,000 copies (estimated 3-year supply) Does not include cartography or photo costs	Research, writing, design: $2,500 - $3,500 Printing: $9,000	4 months
Personal Interactive Device Tour (Park lends visitors audio wand, mp3 player or GPS-equipped audio-video player)	Includes content development and recording for approx. 45-min tour, hardware costs for 20 proprietary devices or tour-quality (extra rugged) mp3 players, annual fees for five years Low end is audio-only tour, high end is audio-video with GPS tour stop locator; MP3 player audio-video tour in middle of range	$23,000 - $50,000	4 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Cellphone Tour (Visitor's own cellphone)	Includes content development and recording for approx. 45-minute tour, usage charges for five years Usage charges are based on either the number of calls or the number of minutes (different providers charge one or the other); this estimate assumes 800 calls or 2,000 minutes per month Charges can vary considerably depending on the number of visitors who use the cellphone tour, and how the provider calculates charges	$21,000 - $40,000	3 months
Smart-phone Audio-Video Tour (Visitor's own iPhone or compatible device)	Includes content development, recording and annual fee for five years for approx. 45-minute tour	$40,000	5 months
Podcast (Visitor's own mp3 player)	Includes research, script writing, voice talent, added music and recording of approx. 5-7 minute podcast	$2,500 - $5,000	3 months
Other			
Pre- or Post-Project Surveys	Many variables—type and length of survey, who's doing it, data being gathered, analysis needed and more This percentage is only for very rough estimation.	5-15% of total project cost	1-5 months

Project Type	Notes	Approx. Out-of-Pocket Cost	Approx. Project Time (After contract awarded)
Focus Group	Using contractor; includes trained facilitator, recruitment and payment of participants, facility, video and transcript, refreshments Does not include any department staff time Minimum of three sessions recommended for reliable results.	$6,000 per session	3 months
Visitor Study	Varies widely with study type (direct mail, telephone, in person, etc.) and detail of analysis	$5,000 - $20,000.	6 months
Specialized Photography/Photographs	Costs vary based on size and resolution needed, and difficulty of photographing subject (people and rare animals tend to be most expensive)	$50 - $600	3 months
Park Map (two-dimensional)	Includes only creation of map, not production as either a panel or publication Cost and time are highly dependent on having knowledgeable and responsive park contact to provide information	$2,000 - $3,000	4-6 months
Campground Map	Work with Publications Section of Interpretation and Education Division See Park Map note re. time dependency	**Free!** (except for minimal staff time providing information to Publications and reviewing map)	3-12 months